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ABSTRACT

This study considers the ways in which recent major changes in Peruvian education (particularly primary education) will affect the organization and effectiveness of the school inspectorate. It also attempts to identify problems that are likely to arise as a result of the confrontation between traditional and new educational approaches and attitudes. Most of the data for the study were gathered by a UNESCO consultant during a 1973 study tour of the Lima, Cuzco, and Trujillo regions. The first section of the paper examines the present situation in Peruvian education and the changes in organization and content that are envisaged. The second and lengthiest section describes the school inspectorate and discusses its functions in light of the situation described in section 1. The third and final section summarizes the study's main conclusions. (JG)

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IIEP research report: (14)

PRIMARY SCHOOL INSPECTION IN PERU

Raymond F. Lyons

The organisation and staffing of the primary school inspectorate: case studies - 4

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INTRODUCTION

1. The policy of the Revolutionary Government of the Armed Forces in Peru, since it came to power in 1968, has been to undertake a series of social and economic transformations aimed at ending the double conditions of under-development and dependence which it had seen as characterising traditional Peru. The philosophy behind these changes does not appear to be associated with any particular political affiliation, but rather with the thinking of a group of military, academic and ecclesiastic scholars which has been advising the Government. The main thought embodied in this philosophy is that hitherto Peruvian life was dominated by groups of foreign and national exploiters while the mass of the people was alienated in work and life from participation in the social and economic development of the country. Consequently, the content of development is seen to lie in remedying the main structural imbalances in the economic and social life of the country.

2. Profound reforms affecting both internally- and externally-held power positions have therefore been introduced since 1968 involving significant changes in the ownership and control of certain resources and increased participation of the masses. An extensive land reform has been undertaken through which individual large landowners have been replaced by cooperatives and a national system of support for social mobilisation (SINAMOS) has been established to assist in the organisation and control of enterprises affected. Foreign-owned mines have been nationalised. Workers' participation in the ownership, operation and profits of industrial and commercial concerns is being progressively increased.

3. As part of the new emphasis on democratic organisation and planning, from the masses to the top, and in order to support the reform actions in other sectors of the life of the country already mentioned, extensive changes

in the educational system, including both in-school and out-of-school education and training, were introduced in 1972. These, like some of the other reforms are to be progressively implemented ; they are expected to be completed by 1978. The education reform is embodied in a decree law (no. 19326) of March 1972, which specifies changes in the structure, content and administration of education. It is intended to : "provide for the training of the Peruvian human being at all stages of his development and in all aspects of his personality ... to end the exclusive nature of education of which schools have had (or behaved as if they had) a monopoly ... and to ensure a constant inter-relation between school and community with fully participation of all citizens"(1). In the words of the Head of State, General Velasco Alvarado : "Without an effective, profound and permanent transformation of Peruvian education, it is impossible to guarantee the success and the continuation of the other structural reforms of the revolution. Hence, the educational reform, the most complete hitherto, the most important of all, constitutes the essential prerequisite for Peruvian development and the central objective of our revolution".

4. The visit to Peru for four weeks in January and February 1973, thus took place at a time when far-reaching economic, social and educational reforms had taken place and the country was engaged in a process of consolidation, namely of achieving the practical steps whereby the vision which had guided the changes might be transformed into successful reality. This is basically a matter of modifying the practices, attitudes and ways of life of traditional Peru, and of incorporating the new dispositions into the day-to-day life of the country. As in other countries, the consolidation of reform is proving a challenging and complex task and this is particularly relevant to education. It forms the background to the present study.

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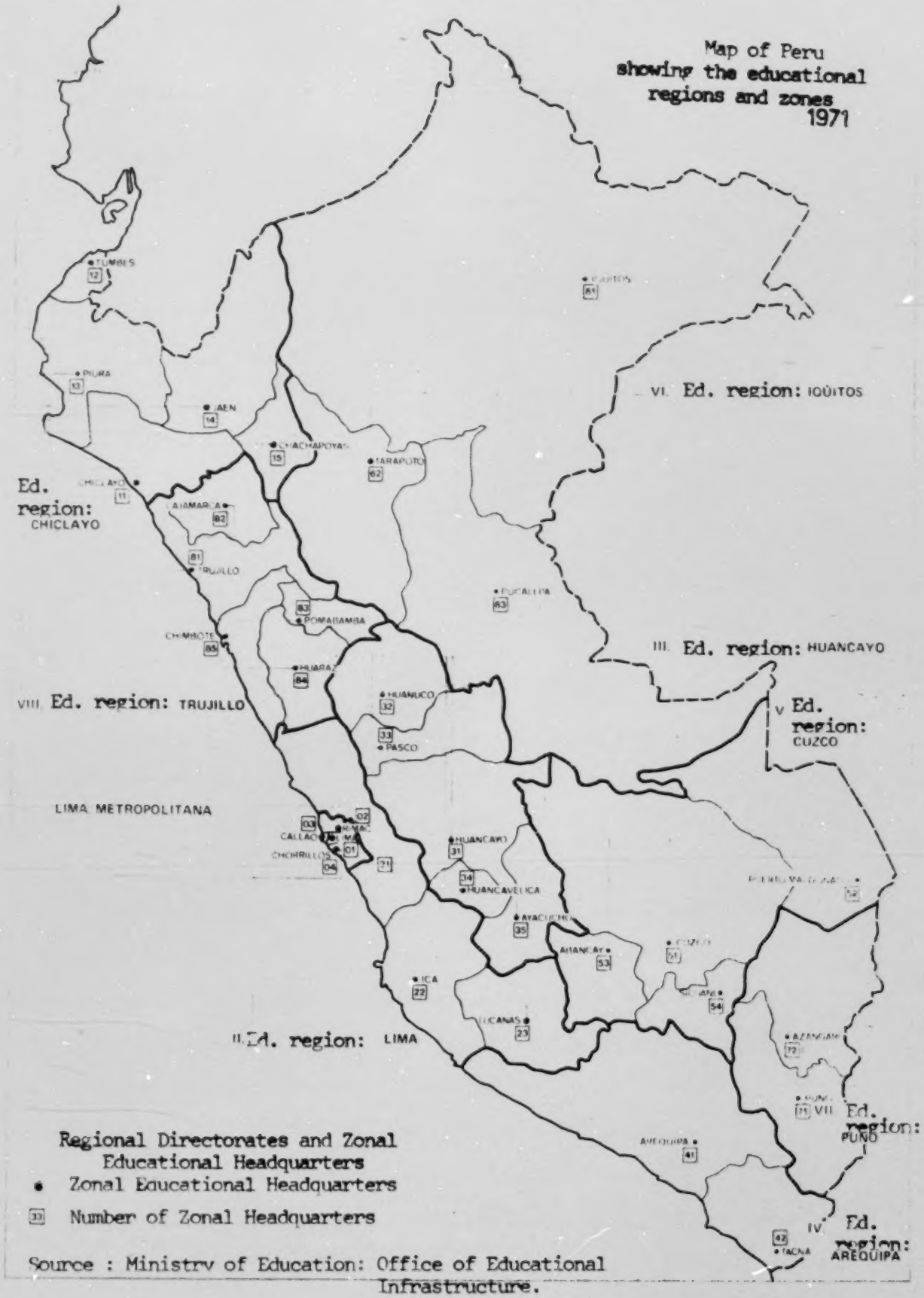
(1) A. Salazar Bondy. "On educational reform in Peru". Prospects : Quarterly Review of Education, Volume II, No. 4, 1972. Unesco.

5. With the kind cooperation of the national authorities, we visited Lima and the regions of Cuzco and Trujillo in early 1973, in order to collect materials for this study. At that time the administrative regulations concerning the "nucleos educativos comunales", the new basic educational units for strengthening the participation of the community in education, were being prepared. The new dispositions governing the staffing and organisation of educational administration were being worked out. The work involved in the process of the reform of education was only, relatively, at its beginning. The approach adopted in this study is, therefore, to consider the ways in which the substantial changes being introduced in education, and particularly primary education, will affect the organisation and effectiveness of the work of the inspectorate and, in particular, to identify the problems which are likely to arise, and need to be resolved, as a result of the confrontation between traditional and new approaches and attitudes.

6. If it may be accepted that the inspectorate, as it is generally known, in practice carries out administrative, assessment, advisory and communication tasks, a hypothesis underlying this study is that the first two, which involve largely routine and, in a sense,controlling "police" activities, may in fact be the main functions, and that the inspectorate may not yet be staffed, organised or controlled adequately to perform the last two. In essentials, the only justification for the existence of the inspectorate would seem to be that, through its activities, the teachers and headmasters should be helped to provide improved learning conditions for the children. This is not only a question of what the inspectors do, but also of whether the specific conditions of education are such that what they do can be expected to produce positive results. This paper, therefore, contains three main sections : an examination of the situation of education and the changes in organisation and content which are envisaged, the situation and the functions of the inspectorate in the light of the above, and finally some conclusions.



Source : Ministry of Education: Office of Educational Infrastructure.

I. THE EDUCATIONAL ENVIRONMENT AND ITS REFORM

Peru and its people

9. Those responsible for the administration of education have to take account of the fact that Peru is a large country, more than twice the size of France, with three distinct regions, the dry coastal area, the sierra and the selva, each of which has its specific problems of communications, population distribution and economic development. The coastal area, with some fifty valleys watered by rivers rising in the Andes, contains about a third of the population, including Lima, the capital, and several other important cities ; communications are easy. The sierra, with two mighty cordilleras running through the country, is characterised by high plateaux, deep valleys and travel is difficult and dangerous. It is the homeland of more than half of the population. The selva is an extensive sparsely-populated area, lying East of the Andes and forming part of the headwaters of the Amazon. Travel from the cities of the plain to the sierra and the selva is normally by plane, since the road system does not yet permit safe and relatively rapid communication. It should be added that Peru lies, in the main, within an earthquake area. There is still much evidence in the plain and sierra areas, for example, of the effects on school buildings of the terrible earthquake which took place in May 1970.

10. Total population, some 14 million in 1973, is increasing at a rate of 3.1 per cent a year, which, if maintained, means that it will double every 22 years. It is estimated that nearly a half of the total population is made up of people under 15, and that more than a fifth are enrolled in school. There is substantial internal migration away from the sierra to the cities of the coastal strip, each of which is surrounded by its area inhabited by "pueblos jóvenes" (new cities), who require to be provided with education.

Since a substantial part of the mountain population is Indian and does not speak Spanish but Quechua or, to a lesser extent, Aymara dialects, the educational authorities are faced with complex linguistic problems in extending educational provision.

11. If the relationship of education to the livelihood of the people is considered, it may be said that Peru, a treasure house of minerals of virtually all kinds, and with great agricultural potential, is seeking to move beyond its traditional role as an exporter of raw materials and estate crops, develop a more advanced economy, and remedy imbalances as between regions. This question is discussed in some depth in another study undertaken by IIEP(1). At the present time, although about half the population is living in towns, and services are fairly well, if unevenly developed, Peruvian industry, with the notable exception of a steel complex at Chimbote, is mainly confined to textiles, light engineering, food processing and the refining of mineral products. As regards agriculture, a distinction should be drawn between the nationalised large estates, producing mainly export crops (sugar, rice, cotton, tobacco), mostly on the coastal plain, and the small subsistence farms in the sierra, with potatoes, maize, wheat and barley the principal crops, where the population finds it difficult to make a living. Only a fraction of the cattle-raising potential of the sierra and the possibilities for producing timber and tropical crops of the selva are exploited. This discrepancy between the coastal region and the remainder of the country has important implications for the organisation of the new approaches to education.

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(1) G. Hay : Educational finance and educational reform in Peru.

Recent developments in primary education

12. The introduction of the educational reform of March 1972 came after a period of exceptionally rapid expansion in enrolments in all levels of education. Between 1963 and 1970, day enrolment in primary schools had risen from 1.6 to 2.5 million (of which about one-seventh in private schools), and evening enrolment from 65,000 to 180,000 ; in secondary schools, from 220,000 to 527,000 ; and in institutions of higher education, from 46,000 to 106,000. The remaining educational gap, as concerns primary education, if the generous objectives of the reform are to be reached, can be said, in the first place, to be the part of the adult population, estimated by official sources to be a third to a half of the total, which is illiterate. In addition, about one-quarter of the children aged from 6 to 11 years, the official primary age group, are not enrolled in schools(1).

13. For linguistic, as well as social and economic reasons, the incidence of adult illiteracy and low participation in education are concentrated largely in the sierra region among the Indian subsistence farmers, in the poverty belts (pueblos jóvenes), peopled mainly by migrants from the sierra, around the cities of Peru and in other rural areas. The achievement of the objectives included in the 1971-1975 plan to ensure complete enrolment of the children of primary school age and eradication of illiteracy in the 15 to 39 age group, by 1980, will depend to an important extent on what can be done in the rural areas and among the pueblos jóvenes.

14. In addition to measures planned to reduce the quantitative gap in educational provision, the authorities are seeking to remedy certain other quantitative and qualitative defects in primary education, as it exists at present. Repetition is substantial, and there are many children over age in each of the six grades of primary. Drop-out, particularly in the rural areas

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(1) Source : Ministry of Education. Plan for the education sector, 1971-1975.

where single teacher or two teacher schools are characteristic, means that in the country as a whole only 4 out of 10 children who enter grade 1 of primary reach grade 6.

15. The authorities are faced with serious financial obstacles to improving matters. Since as much as 97 per cent of the total recurrent cost of primary education is devoted to teachers' salaries, very little remains for spending on items which contribute to adequate standards in education. While good educational results have been obtained in some countries, despite very inadequate school accommodation, it would seem to be true that where the home environment is one of deprivation and there are problems of teacher morale, it is helpful if the school is in a good state of repair, bright and well painted. This is not always the case in Peru, where the problem is not only financial but also one of community mobilisation to improve matters. It was estimated that a quarter of all primary schools and three-quarters of rural primary schools are in a state of repair and maintenance which is below what the authorities consider to be normal. In addition there is a shortage,affecting the majority of schools, of books, teaching materials and visual aids.

16. The constraint on development, which teachers' salaries represent, is shown also by the fact that while more than 13,000 qualified teachers were unemployed at the time of our visit, some 24,000 of the 64,000 teachers employed (38 per cent) were without a professional qualification. Moreover the pupil/teacher ratio of 42 : 1, which results from dividing the total number of pupils in day and evening primary schools by the total number of teachers, is misleading and the ratio in fact is less favourable since some of the teachers, working in more than one institution, or more than one shift in one institution, have been counted more than once. The less qualified teachers are relatively more numerous in the rural than in the urban areas.

17. Peru's qualified primary teachers have received 15 or 16 years' education, a four-year polyvalent course at a teacher training college or, for a minority, a five-year course at university following six-years primary and five years secondary education. The teacher training institutions are small; enrolment in 1972 in the 50 State teacher training colleges averaged 80 students and in the 11 State universities 250 students per institution. In the new reformed arrangements, it is proposed to reduce the total period of study for qualified primary school teachers to 13 years, that is nine years basic education followed by a four-year course.

18. As a result of salary developments over the years, there are few incentive arrangements in the payments structure, the only exception being a payment for serving in rural areas. Teachers in primary and lower secondary schools, primary headmasters and provincial inspectors receive the same basic salary. An increase of five per cent occurs every five years of service irrespective of performance. There are no salary arrangements in connection with probation of new teaching staff. Family allowances are paid. Given the prevailing financial stringency, it seems difficult for the authorities to do more than meet the most pressing claims of the teachers' unions for an increase in basic pay. They would wish, however(1), and it would seem essential, to create a new structure of pay incentives and fringe benefits in order to win the full support of the teachers for the measures of re-training and rationalisation of the use of teachers' time required by the reform.

The reform of education

19. The educational reform of March 1972 outlines changes in the scope, structure, content and organisation of education, which are to be put into effect in the period from 1972 to 1978. They include both in-school and

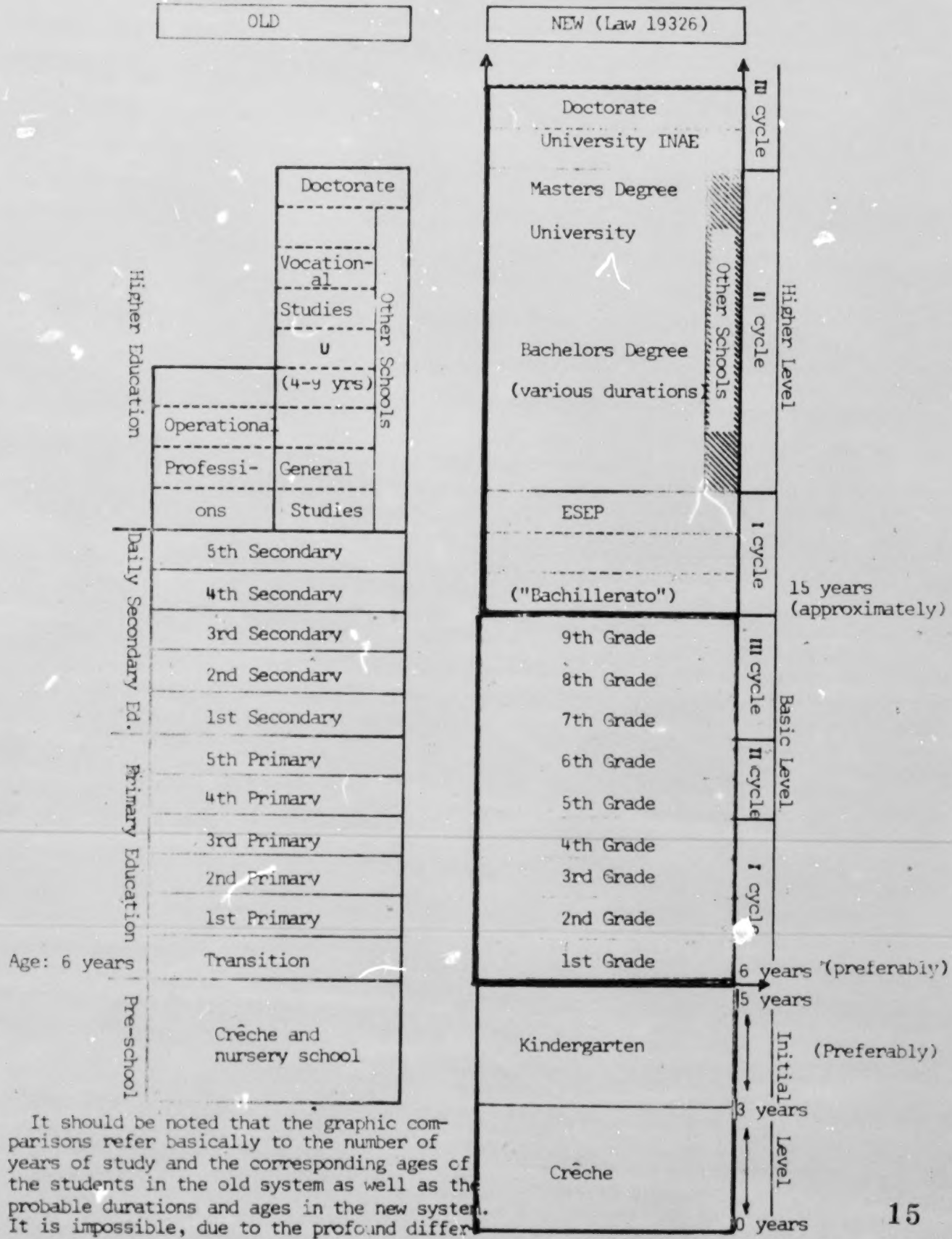
(1) Ministry of Education, Commission for Educational Reform, "Reform of Peruvian education", General Report. Lima, 1970 (in Spanish).

out-of-school education. They will involve, in planning terms, the meshing of quantitative expansion, structural change, reform of curricula and the introduction of the "nucleos escolares", the new units of educational administration.

20. The reform, as shown in Chart 1, includes a new emphasis on, and substantially increased enrolment in, crèches for children under three years of age and kindergartens for those aged four and five years. This is intended to counteract the effects of deprived environment. The former structure of 11 years (six primary and five secondary), schooling is to be replaced by nine years of basic regular education; by 1980 it is intended, as a result of increased enrolment, to ensure six years of universal compulsory primary education, that is cycles 1 and 2 of the new 3 cycle "basic" education for all children of school age. As far as higher education is concerned, it is intended to divide it into three cycles. First, the higher schools of professional education which will provide courses of 3 or 4 years' duration leading to a professional "bachillerato". They will replace the existing division of what is known in other countries as the upper cycle of secondary education into general and professional studies by a single cycle of professional education. The second cycle of higher education is that leading to a first or a specialised master's degree. The third cycle leads to the doctorate. It may be noted that institutions of higher education are to be organised into nuclei which will ensure closer contact with the population and with work according to the same principles followed in respect of basic and initial education.

21. The reform is designed greatly to increase the scale and improve the relevance of part-time education through the development of a parallel system, providing for "laboral" education, namely evening study which adapts the

Chart 1 : Educational System - Comparison between the old educational system and the new system established by the Educational Law.



It should be noted that the graphic comparisons refer basically to the number of years of study and the corresponding ages of the students in the old system as well as the probable durations and ages in the new system. It is impossible, due to the profound difference between the two systems, to compare the content or the quality of education.

Source : Ministry of Education, Lima, National Development Plan for 1971-75, Vol. VIII.

reformed basic programme to adult participants, as well as "educational extension" courses, for professional qualification of workers in factories and on farms. The first cycle of higher (professional) education will be made available, to a greater extent than hitherto, to adult participants. Finally, the reform lays down improved arrangements for the education of the handicapped.

22. The reform of the content of basic regular education is intended to "form in the Peruvian child a critical consciousness of national and world reality as a support for his conscious and creative personal action in life ... encourage attitudes of human solidarity and collective work". To this end, the curriculum is being progressively changed so as to provide a more realistic preparation for life and a closer relationship with national culture. The methods of teaching are also being changed in order to encourage learning by doing. New and more flexible arrangements for the evaluation of pupil performance and for pupil promotion other than examinations are being introduced, it being intended to reduce repetition through improved supervision of individual progress; promotion will, in general, be automatic, but brilliant children may be promoted from one grade to the next before the end of the year, while children with difficulties may delay their grade transfer for a few months(1). A guide for pupil evaluation in the first grade of basic regular education has been issued by the Ministry of Education to all schools in which the reform is being introduced.

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(1) Source. "Reform of Peruvian Education", op.cit.

23. Preparation of the detailed programmes and the relevant texts for the nine years of basic education is the responsibility of the Directorate General for Initial and Basic Regular Education in the National Ministry of Education, in association with the Sub-directorate for Publications and Teaching Materials of the National Institute for Research in and Development of Education (INIDE). The aim is to produce new books and materials for each year of the course and to ensure that these are introduced into the schools. This is an extremely complex task, both from the standpoint of organising the process of curriculum revision and the production of materials. In 1972, attractive new books and working materials were made available, although not always in sufficient quantity, in the 138 nuclearised schools which, in early 1973, represented about one-seventh of the total number, for reading, writing and new mathematics for Grade 1 of the nine-year basic course.

24. No books or guides were available, in the schools visited, for natural science, civics, music, sport and nutrition. In 1973, no new books were available for the schools in 140 new nuclei. Since, as will be discussed below, the progressive incorporation of all the schools into the nuclearised system is to be matched by the extension of the new programmes to each of the relevant nine grades in the schools with the attendant diversified needs in the higher classes, the problem of phasing and logistics is a considerable one. At present, most of the nuclearised schools have applied the first two years of the reformed programme according to the curriculum guide for the first two-year cycle, which has been distributed to the schools. This contains lists of actions and learning objectives which teachers should promote in order that pupils should achieve the defined objectives in language, mathematics, natural sciences, social sciences, psycho-motor activities, religious instruction and certain types of practical work. While teachers with whom we have discussed the new

curriculum, seem to be in favour of the reform, many find it difficult, given the shortage of books, materials and their own training background, to approach their new objectives in a creative way. The re-training of the teaching force and those responsible for teacher training is therefore an important condition for the success of the reform. Since this is, in principle, a task for which all available human resources including the inspectorate and other specialised personnel should be mobilised, it is necessary to look at teacher training more closely.

The teacher re-training programme

25. There is no comprehensive plan for the reform in the sense of detailed and costed objectives for building, resources and teachers for the period 1972 to 1978, in respect of the three cycles of basic regular education, labour education and technical training. The main initial objective at the time of our visit seemed to be to establish the nucleus system solidly and, as far as possible, to consolidate the reformed programmes in the first two years of the first cycle of basic regular and basic "laboral" education.

26. The precise number of nuclei to be established before 1978 had not been determined, but it was expected to be of the order of 950. Of these, 138 had been formed in 1972, 140 in 1973, and 200 were being planned for 1974, at the end of which year about a half of all Peru's schools will be nuclearised, including those to be built during this period. The re-training task is therefore to ensure that the progressive inclusion of teachers in the nuclearised schools is matched by training to enable them to cope with the new curriculum and methods introduced into the nuclearised schools. Whereas the old system was seen to concentrate on knowledge rather than attitudes, the new system to which the teacher must be converted is designed

to form a new man for a new society and the child must be oriented and prepared for it through activities.

27. Re-training is the responsibility of the Sub-directorate for Training of INIDE, which was established in 1971 to work on problems of the implementation of the reform and its evaluation as well as the training of teaching and administrative personnel. An élite of 420 "trainers", together with specialists, provides vacation courses normally of two weeks' duration for teachers in nuclearised schools, in each of the 33 zones, concentrated on the aims of the reform, evaluation and the changes in the curriculum. An analysis of the 1973 programme showed that priority was being given by INIDE to the consolidation of the training of teachers from the schools nuclearised in 1972, and to teachers responsible for out-of-school education classes. Thus, 6,575 teachers, of which 90 per cent are from nuclearised basic regular primary schools, who had followed a two-week course in 1972 at the zonal level, received a further two weeks' training in 1973. On the other hand, because of the expense of holding zonal courses and the shortage of money and training personnel, no training was provided in 1973 for the teachers of the 140 newly-nuclearised schools.

28. In 1973, training was provided for the 2,587 teachers in evening schools (básica laboral), 820 in kindergartens, and 450 animators of education in factories and farms ; these categories having received initial training of up to one month in 1972, and for teachers of part-time professional education. A course on the aims of the reform was also given to some of the administrators at the regional, zonal and nucleus levels. A start was made in 1973 on the retraining of the staff of teacher training colleges. In addition, arrangements were initiated for the qualification, through correspondence courses, of 8,000 out of the approximately 24,000 unqualified teachers in the country. It may be noted that the Directorate responsible for teacher training in the Ministry of Education was not involved in this exercise which was undertaken by INIDE.

29. With the increase in the number of schools nuclearised, the expansion of education, and the growing needs for retraining resultant upon the adoption, grade by grade, of the new curriculum, the backlog of retraining is likely to grow. It is therefore noteworthy that the 1,200 full-time teachers in institutions of teacher training and the specialist personnel in national headquarters, regions, zones and provinces have not yet been mobilised for the task of teacher retraining. It would seem that this disassociation of the educational system in the main from the retraining task is attributable to the view, held by those responsible for the reform, that only a new force, imbued with an understanding of what the new type of learning should be and how it should be integrated with the aspirations of the mass of the people, was capable of the retraining task. There is thus a problem, which will be discussed below of integrating the new training force within the administration of education.

30. INIDE replaced the Higher Centre for Teacher Improvement in 1971, as the body responsible for teacher retraining. Its first task was to recruit and train the élite body of trainers, who, today, receive total remuneration approximately double that of a classroom teacher, primary school director or provincial inspector. INIDE recruited its staff from serving qualified primary teachers who applied for acceptance. These persons followed initially a three-month course in Lima from November 1970 to January 1971, designed to promote consciousness of the needs and content of the reform and of the changes in the various elements of the curricula which were to be introduced. From May to December 1971, they followed a six-month course in the theory and practice of the reform of which a half consisted of course work at INIDE headquarters in Lima and half of professional work in teacher training colleges leading to individual reports on the problems of applying the reform. The trainers were

then sent in groups to the 33 zones where, in accordance with the directions of INIDE in Lima (rather than the zonal education authorities), they provided training for the teachers of nuclearised schools in the summer vacation, that is from January to March 1972. Until early 1973, the groups of trainers in each zone were directly responsible to INIDE in Lima. But in early 1973, as part of the new training effort, it was decided that they should become part of the zonal administrative structure under the responsibility of the zonal director. This step facilitated coordination for training purposes between the "trainers" and the staff of the specialised technical pedagogical groups in zonal headquarters who, after INIDE training, were also involved in the training task.

31. It may be mentioned that, in addition to the training of trainers, INIDE has provided courses for the directors of **nuclei** , the professional support staff of **nuclei** and also for some of the specialist educational staff of the regional and zonal administrations.

32. The authorities have thus been conscious of the fact that to achieve the reform it is necessary to give prior attention to the creation of new teacher attitudes and practices and closer contacts between the school and the community. The INIDE trainers can be regarded as an innovating and proselytising force in this regard. But to ensure that the day-to-day work of the schools is changed in practice, in accordance with the reform, the authorities have introduced major changes in the administration of education. These include the nuclearisation of all schools and the reform of the national system of administration. In the next section of the paper, we will discuss these changes and the problems which exist in relation to the tasks of mobilising the inspectorate for the task of implementing reform.

II. THE NEW ADMINISTRATIVE SITUATION AND FUNCTIONS OF THE INSPECTORATE

THE COMMUNITY EDUCATION NUCLEI

33. The essential points about the reform, as it concerns the tasks of the inspectorate, are that it creates throughout the school system a new professional group, the supervisory staff of the Community Education Nuclei, and that the role and tasks of the former national, regional, zonal and provincial supervisory organisations have been changed in consequence. These two points will be discussed successively.

34. The system of nuclearisation, which will embrace all levels of the educational system, is a development from the pioneer work undertaken in Peru since 1960, in the rural education nuclei. Some 80 of these, situated in the Sierra and Selva areas of the country will be incorporated into the new system of nuclei. They included some 10 to 12 schools in each nucleus. They were staffed by an educational director, and three specialists in literacy, health and agriculture respectively. Their aim was to encourage rural educational, social and economic development.

35. The community education nuclei represent an attempt to achieve a more complete mobilisation of education as a social function, so that the community is responsible for it and everyone in the community can benefit from it. To this end, the nuclei represent social micro planning units which, in their aggregate, constitute at the zonal, regional and national levels the plans of the education sector as part of national economic and social development.

36. The community education nucleus groups all public and private kinder-gartens, primary schools and secondary colleges and is also responsible for undertaking all the different types of out-of-school education required in the area. When the full nine years basic regular course and the ESEP (schools of professional education, first cycle of higher) have been established, the latter will be the responsibility of the zone, which at present supervises the second cycle of secondary education. Teacher training colleges are at present supervised by the region but will be supervised by the zone when the reform is completed. The number of institutions included in each nucleus varies according to the density of the population. In urban areas, as many as 40 schools of different types may be included, whereas in sparsely-populated rural areas, there may be less than 10.

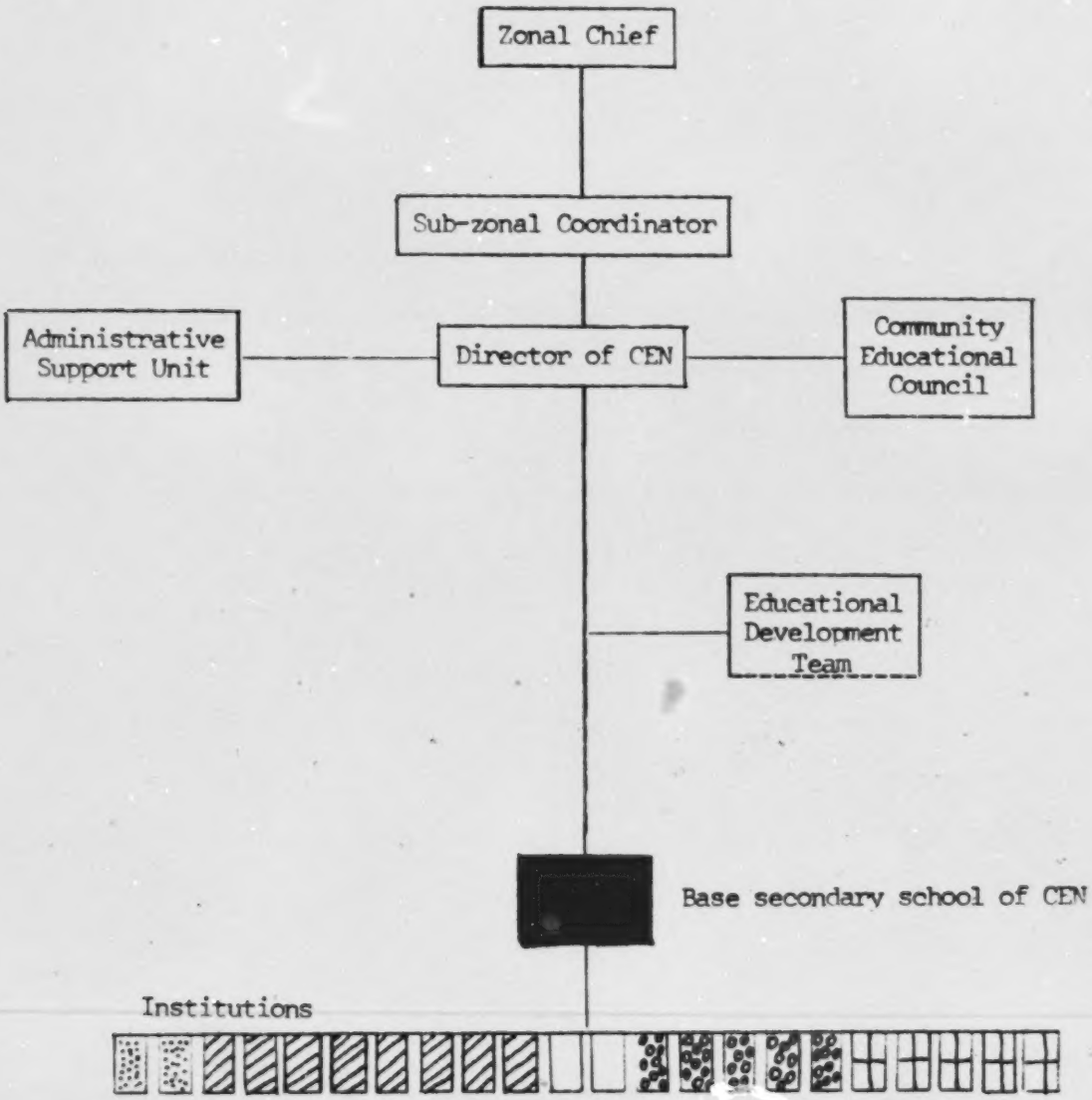
37. The base for the activities of the community is normally a large secondary school (gran unidad escolar), where the school director and his staff have made room for the nucleus director and his staff, lent them furniture and share their telephones with them. Since the nucleus director's secretary and administrative support unit usually consists, altogether, of not more than two persons, the base frequently lends typewriters, calculating machines and personnel also. In the plans prepared by various nuclei there is reference to the building in each nucleus of a centre which would group all the in-school and out-of-school educational and cultural activities of the community. This would seem a rational solution; it is dependant on finance being found.

38. The director of the nucleus is selected from a list of applicants by the zonal education chief for a non-renewable period of three years. He is required to be of Peruvian nationality and a fully qualified teacher, with more than five years' service, who is engaged in teaching in the zone. He is expected to be fully conversant with the reform. If possible, he

should have followed one of the retraining courses described above, but in any case he must show that he is fully identified with the process of change involved in the reform. He should have had some experience of community work. The director is the technical and administrative chief of all state kindergartens and basic regular schools in his area and is responsible for the general supervision of all formal and out-of-school state and private institutions and activities. In this capacity he is required to prepare and implement plans, promote particular studies, ensure the development of the teaching force, liaise with teacher training colleges and ESEPS and follow all policies as laid down by the zonal office and by his advisory body. This is a full-time post, but exceptionally the director of the nucleus may also direct the institution which serves as a base, that is normally a college of secondary education.

39. The structure of the nucleus is shown in Chart 2. The Community Education Council advises the Director on all matters concerning education in the community and institutionalises the participation of the community in education. It is made up of not more than 20 members, or less than 10, elected by secret ballot by the three group organisations involved, of which 40 per cent represent the teaching profession, 30 percent parents of pupils, and 30 per cent other local sectors of cultural, social and professional community life, with the exclusion of political parties. As an example, in the 1972 Surquillo CEN (4th zone of Lima Metropolitana Region), the teaching profession is represented by three persons from private secondary schools and from a private kindergarten,one each from a state primary and a state kindergarten, and two from state colleges of secondary education. The parents' representation consists of three parents from private secondary colleges, one from a state secondary college, one from a primary school, and one from a state kindergarten. The "community of authorities and institutions" is represented

Chart 2 : Structure of a Community Education Nucleus (Lima Metropolitana)



= State kindergarten

= State primary school

= State college (seondary)

= Private primary school

= Private college (secondary)

by the Mayor of Surquillo, a member of the Lions Club of Surquillo, a member of the Chamber of Commerce and Industry, a representative of the Peruvian Telephone Company, one from the Rotary Club of Surquillo, and one from the 22nd Avenue Police Commissariat. Another example from a Callao (Lima) nucleus (02/03) reinforces the impression that in urban areas primary teachers and parents of primary pupils are relatively under-represented on the Community Educational Council and that the composition of the "community of authorities and institutions" is designed to ensure participation of finance providers rather than to mobilise the mass of the population for education.

40. This situation, which may not be valid for rural areas, is of some importance, in relation to one of the tasks of the Council, to form committees for educational action. These committees, which may be temporary or permanent, are made up of volunteers, members of the teachers or parents communities represented on the Council, and persons from other sectors. They can be expected to work with the director of the nucleus and with the educational development team of the nucleus, which, as we shall see, is to fulfill the essential functions of the inspectorate at the nucleus level.

Work of the educational development team

41. Each nucleus includes an educational development team, with a staff of three or four specialists, namely one each in initial (kindergarten) basic regular education, basic "laboral", educational extension and, frequently, orientation and welfare of the pupil respectively. These specialists are not polyvalent and, at the present time, the work load for the specialist in initial and basic regular education is much greater than that for his or her colleagues.

42. The work projects approved by the nucleus director for the four specialists for 1973 in the Surquillo (Lima Metropolitana) nucleus(03) were as follows:

(a) Initial and basic regular

Through meetings with teachers and class supervision of grade 1 teachers, ensure that the "global method" of reading, using the text "amigo" (friend) is mastered. Teach the new techniques for the application of "targets for work" in using the new mathematics text. Diffuse the techniques for the use of the new writing exercise books. Ensure that the new arrangements for pupil evaluation and the planning of the curriculum are applied in initial and grades 1 and 2 of basic. Diffuse the proceedings to be followed in the adapted programmes (i.e. certain nuclearised and non-nuclearised schools) in grades 2, 3 and 4. Provide teaching in new methods of modern mathematics teaching for teachers of grades 4 and 5. Help teachers understand group dynamics in the organisation of class work.

(b) Basic "laboral"

Evaluate the pupils of the first cycle in order to classify them. Work out with the teachers the detailed curriculum for the second cycle. Form workshops in order to develop the "areas of work training" in the second cycle. Help draw up adapted programmes for the fourth and fifth years. Train the teachers of BL in language and mathematics teaching.

(c) Extension education

Carry out the survey of "the economic and social reality" of the nucleus, with the collaboration of teachers and pupils of the 4th and 5th years of secondary education. Help form popular libraries in the Community. Organise literacy classes within the nucleus. Undertake courses for teachers of extension education. Organise a seminar for the diffusion of the reform for teachers and parents. Organise inter-school sports competitions. Organise cultural clubs in the nucleus. Direct the establishment of an artesanal centre. An example of the work of the laboral and extension specialists was the organisation during the 1973 long vacation of well attended adult courses in the Moche (Trujillo) nucleus in cooking, painting, theatre, dress-making, carpentry and electrical work.

(d) Pupil orientation and welfare

Hold meetings with teachers on guidance and pupil welfare. Ensure that they are familiar with the principles of physico-mental development and maturation of the child in grade 1. Carry out the "guidance for health" programme. Undertake with teachers and parents the programme of sexual education for the pupil. Realise programmes of family guidance as concerns interpersonal relationships. Ensure, with the authorities that an infants' creche is established in the nucleus. Direct the establishment of a specialised institute for exceptional children. Draw up a complete data history on individual pupils. It may be noted that, in rural areas, for example the Viru (Trujillo) nucleus, an important duty of the specialist is to ensure that

all children who are under-nourished, about a half of the total number of pupils, receive additional milk, bread and soya, supplied by the authorities.

43. The work of the specialist personnel in the nuclei visited, in the Lima, Trujillo and Cuzco regions, seems in 1972 to have had one major and positive result in that a constant dialogue had been established between the parents, specialists and many of the teachers in the towns. In the rural nuclei, the lack of funds to pay for travel expenses would seem to have restricted the mobility of the specialists, and schools in outlying areas do not appear to be visited. The specialists are qualified teachers and specialists (e.g. in guidance), who applied to the zonal authorities for their posts and who were chosen to follow (if places were available) a two-month training course organised by INIDE prior to undertaking their duties. At the time of our visit, there was no specific budget allocation in respect of the staff of the nuclei, and the specialists, as well as other members of the nucleus staff, were on transfer from schools or from educational administration. The specialists for basic regular all seemed keen and enthusiastic. They make regular class visits and organise round tables, discussions and training courses with teachers and headmasters, reporting to the nucleus director on progress and problems related to the implementation of the reform in individual schools. But, it may be noted that neither school directors nor specialists make regular reports on the work of the teachers. The specialists sit in the base college when they are not visiting. Their working conditions are frequently difficult owing to lack of space, inadequate furniture and secretarial assistance. When resources permit, they hope they will have working libraries.

44. Reports by specialists and conversations indicate that their advice is, in the main, welcomed by teachers of basic regular education. Their main problems seem to be the state of repair of the schools, shortage of furniture, books and teaching materials, lack of initiative by the teachers due to inadequate training, in coping with the new curriculum, and difficulties in obtaining help from the groups of "trainers" stationed in the zone. The teachers of basic laboral (evening) classes would seem to be faced with greater problems than the day teachers. Thus, for example in nucleus o2 (Callao, Lima), where teaching materials and workshop facilities were lacking and classrooms badly lit, the specialists' evaluation report (1972) stated that there was "little participation of the teachers in solving (unspecified) difficulties, a situation which results in the drop-out of pupils". This may be due to the fact that many evening-class teachers undertake this work in addition to their regular day-time teaching.

45. The specialists are required to participate in innovating activities designed to improve learning and develop the cultural mobilisation of the community. Thus, in the Viru (Trujillo) rural nucleus in 1972, an art festival and festival of gymnastics, judo and karate were organised with the participation of eight schools. The out-of-school study groups provided an exhibition of artesenal work and gardening. Inter-school competitions were arranged in mathematics, language, painting and modelling. Seventeen civic meetings on subjects ranging from sexual education to the running of farm cooperatives were held at the nucleus base as well as the organisation of choral activities, dancing, acting and ballet, with the help of the Trujillo theatre, which is located in the regional capital, some 40 kilometres from Viru.

46. During the first year of existence of the nucleus, the specialists also participated in a number of the activities connected with its consolidation. These included the preparation of a complete geographical, economic and sociological survey of the population in the nucleus, a detailed registry and analysis of institutions, resources and requirements for improved efficiency in school and out-of-school education, a school map, as well as many organisational proposals concerning the introduction of the reform and participation of the community in education. As a basis for undertaking the latter, the specialists, together with the Director and the working groups of the community nucleus council, drew up a series of detailed operational plans for each of the activities involved in the consolidation of the nucleus. This was original work compared with what happened before.

47. An analysis of these plans, and of the work of the specialists proposed in them, shows that, since state and regional funds are limited, much depends on whether community energies can be mobilised to make good some of the main material defects which exists in the schools. The spirit of the reform is that in order to counteract the atmosphere of individual defeat which arises from poverty and non-participation in the life of the community, schools should be solidly built, well repaired, painted, furnished and bright with posters, maps and flowers. It is also vital that the teachers, in order to benefit fully from the help provided by the specialists, should not be hampered by shortages of the relevant books, manuals and working materials. The basic regular schools, which we visited, were in general grim places, in poor repair, in need of paint, lacking in visual aids and colour and short of furniture, books and learning materials.

48. The authorities are seeking to create the conditions whereby the communities regard the schools as "their thing". A start has been made and there are examples, though as yet relatively few, of parents groups which have built or repaired and painted schools, provided furniture, books and materials, paid for caretakers in larger schools. But there would seem to be a rather general feeling among the population in the areas visited that education is a matter which is looked after by the "authorities", and that they themselves are not responsible. Thus, for example, in Otuzco, a typical Andean town, 2,500 metres above the sea and 75 kilometres from Trujillo, the population under the leadership of a dynamic young priest Father Jesus Calderon Urbin, had recently built a church meeting and education centre which was in an exemplary state, and also provided a very substantial money contribution and voluntary labour for the building of a cathedral using the marble quarried locally. The schools on the other hand suffered from the defects described above and despite the evident devotion of many of the teachers met, the educational institutions of the town could clearly benefit if the same spirit of enthusiastic support shown by the population to the church should be brought to bear on the schools.

49. Mobilisation of the community in terms of individuals in factories, farms and households doing voluntary work might also result in economies in the use of personnel for the support teams. In the Viru (Trujillo) rural nucleus for example, the specialist for basic regular schools was responsible for 26 schools and 86 teachers and, given the dispersal of schools over the countryside and lack of transport, found it difficult to visit them all regularly. But the specialist responsible for basic laboral (evening) education was responsible for only eight teachers and three courses. Similarly the specialist in charge of adult extension work had a relatively lighter load. The person responsible for pupil welfare and guidance

on the other hand, seemed to have much work to do owing to the serious problems of health, food and employment in the area. It would seem that two specialists with voluntary helpers might, in this case, be able to undertake the specialised support duties involved in this nucleus.

50. The specialists in basic regular education would seem to spend about two-thirds of their time in visiting schools and classrooms, organising discussion in the nucleus base on Friday afternoons and work with teachers and parents on Saturday mornings, and assisting in the provision of courses during vacations. Not all specialists can do the latter, however, since they have not attended training courses organised by INIDE, and the authorities are planning that they should do so. Arrangements are also being made for specialist further study by correspondence with INIDE. As yet, the faculties of education of the universities are not involved in this effort. Of the specialists met in the nuclei of the Cuzco (sierra) region, only a minority were fully familiar with the Indian language. The training of the specialists and teachers, as well as production of teaching materials in the Quechua or Aymara languages, constitutes one of the priorities for the reform. This part of the task of implementation is at a rather early stage.

51. The specialists in basic regular education are involved in administrative activities which would seem to take up about one-third of their time. In view of the fact that the Director's administrative support team is frequently understaffed, there are cases where this proportion may be exceeded. But normally four types of administrative duties are involved. These include correspondence with schools, transmission of documents, such as study certificates, directives from the zones to the schools, discussion of work on administrative and statistical matters concerning teachers and pupils and investigation of complaints. These may be complaints by parents about pupil progress or about teachers or headmasters, or complaints by teachers or headmasters.

There are usually more than a hundred complaints of one kind or another which require investigation each year in urban nucleus areas.

52. The staffing implications of nuclearisation are considerable for the system as a whole, and at the time of our visit, it was not clear whether the staffing pattern embodied in the 1972 nuclearisation programme would be followed in the other years involved or whether economies would have to be made. There was no budgetary allocation for nucleus staff in 1972, and their salaries had been financed from other approved education expenditures. If it is assumed that there will eventually be some 900 nuclei, each with a director, an administrator, a secretary and an assistant, together with an educational development team of four specialists, this gives a total of 7,200 staff required for the nuclei. It has been suggested above that economies in staff use might be achieved through increased sharing of specialist personnel, subject to transport availabilities, which at the time of our visit were virtually non-existent, between two or more nuclei.

53. A more basic issue concerns the relationship between the nucleus as an instrument of decentralised supervision of education and the existing structure of supervision from the National Ministry of Education in Lima, down through the region and zone to the province and district. If the director of the nucleus is to be responsible for the "planning, organisation, direction, control and evaluation of the educational programmes and institutions in the nucleus" (Supreme Decree No. 005-73-ED of 1973), with an administrative and professional staff to help him, how do his functions fit in with the new tasks of the existing, and large, body of supervisory and administrative personnel at the different levels ? This will be the subject of the second part of this chapter.

THE SITUATION AND FUNCTIONS OF THE INSPECTORATE

54. To understand the tasks of the inspectorate as a whole in relation to nuclearisation, it is proposed to :

(a) look at the national structure of educational administration as it has existed since the administrative reform of March 1971 (Decree 18799), and see how inspection fits in with the other tasks involved ;

(b) consider the detailed functioning of inspection at the provincial, zonal, regional and national levels.

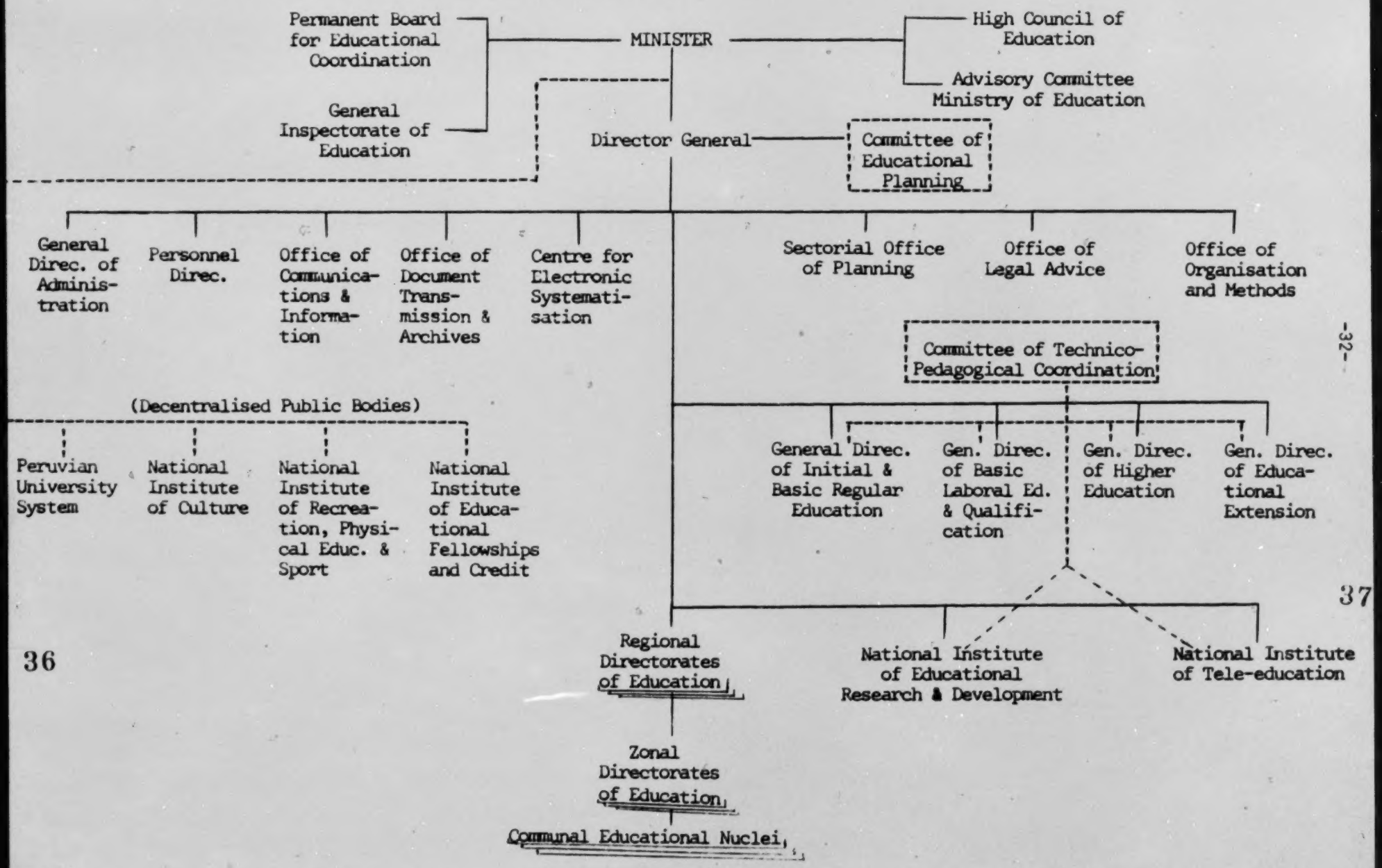
Inspection within the administrative structure

55. The integrated system which follows the reform is intended "to make the inspectorate function (see Chart 3), complementary to the political decision-making function insofar as it guarantees the correct execution of norms, and an integral part of reform action insofar as it guides in a permanent fashion, and free of the vice of fault-finding (fiscalización) the conduct of the educational process"(1). To this end, it will be seen that the Inspector General for Education reports directly to the Minister of Education and that the inspectorate is represented at each of the levels of educational administration.

56. Peru's educational administration can best be understood if it is remembered that, at the national level, the High Direction is advised and served by certain professional, and norm-creating, and support bodies, and that the High Direction and all the other bodies are also represented at the regional, zonal and nucleus levels. It is important to note that the regional, zonal and nucleus authorities are, in principle, autonomous and

(1) Source : Ministry of Education, Commission for Educational Reform. Reform of Peruvian Education. General Report. Lima, 1970.

Chart 3 : STRUCTURAL ORGANIGRAMME OF THE EDUCATIONAL SECTOR


Permanent Board for Educational Coordination
General Inspectorate of Education
MINISTER
High Council of Education
Advisory Committee Ministry of Education
Director General
Committee of Educational Planning
General Direc. of Administration
Personnel Direc.
Office of Communications & Information
Office of Document Transmission & Archives
Centre for Electronic Systematisation
Sectorial Office of Planning
Office of Legal Advice
Office of Organisation and Methods
Committee of Technico-Pedagogical Coordination
(Decentralised Public Bodies)
Peruvian University System
National Institute of Culture
National Institute of Recreation, Physical Educ. & Sport
National Institute of Educational Fellowships and Credit
General Direc. of Initial & Basic Regular Education
Gen. Direc. of Basic Laboral Ed. & Qualification
Gen. Direc. of Higher Education
Gen. Direc. of Educational Extension
Regional Directorates of Education
National Institute of Educational Research & Development
National Institute of Tele-education
Zonal Directorates of Education
Communal Educational Nuclei

that neither the "norm-creating" directorates nor the support directorates at the national level exercise direct authority over them, all authority being canalised through the High Direction. Subject to this, the nine regions and 33 zones are required, by the High Direction, to adapt specified national education norms to their specific requirements.

57. The High Direction of Education is constituted by the Minister and the Director General of the Ministry, the Inspector General reporting directly to the Minister. The High Direction is advised on educational policy by the High Council on Education, which participates as the representative of the Minister in the deliberations of the Committee of Educational Planning and the Committee of Technico/Pedagogical Coordination is an interministerial committee, presided by the Minister, on which the Directors General of the norm creating bodies of the Ministry serve. The (Education) Sectorial Office of Planning services the Committee of Planning. The Office of Legal Advice and the Office of Organisation and Methods advise the High Direction in their respective fields of competence.

58. "The "norm-creating" bodies are supposed to guide, provide norms for, and coordinate educational activities, in conformity with the policies of the High Direction, as well as give technico/pedagogical guidance to the executing bodies"(1). They include the following general directorates:

- Initial and Basic Regular
- Basic "Laboral"
- Higher
- Extension
- National Institute of Educational Research and Development (INIDE)
- National Institute of Television.

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(1) Source. Ministry of Education. Organic Law of the Education Sector(19602). Lima, 1972.

59. The support bodies are technical offices which are responsible for undertaking defined activities in order to meet the needs of the Ministry. These do not include the inspectorate, which reports directly to the Minister.

(a) Directorate General for Administration :

responsible for the functioning and internal control of the systems of supply, accounting, treasury, budget, as well as educational buildings and equipment and the overall administration of the material and financial resources of the Ministry.

(b) Directorate of Personnel :

responsible for administration of personnel in the Ministry.

(c) Office of Communications and Information :

responsible for providing norms for, assuring and controlling the internal and external system of document circulation and archives in the Ministry.

(d) Centre for Electronic Data Systems :

responsible for advising and supporting the bodies of the Ministry in the operations, methods and procedures relating to data systems which can improve the efficiency of management.

60. The executive bodies in the national education system are the Regional and Zonal Directorates of Education and the Communal Educational Nuclei. They are expected, at their respective levels, to carry out activities of "advice, inspection, technico-pedagogical coordination and support" to the educational institutions of their area. It will be seen from Charts 3 and 4 that the regional and zonal headquarter structures repeat the main

functions mentioned in the description of the national Ministry of Education.

61. At the time of our visit the organisation of the national inspectorate was being revised with the aim of making it, at all levels, an instrument to verify and evaluate all the technico/pedagogic and administrative aspects in the educational sector and a permanent service of orientation and technical guidance. To this end, the inspectorate at the regional and zonal levels was to be enlarged, so as to include four sections, namely :

(a) the new office of regional inspection (investigation) ;

(b) the office of supervision (as before the reform) ;

(c) a new auditing (and organisation and methods) office ;

(d) a new office of administrative control which would take over certain of the functions of the office of regional administration.

As can be seen from Table 1 and Charts 4 and 5, the full development of the inspectorate function will involve further changes in the organigramme and in staffing patterns.

62. It would seem that, in the regions and zones, the inspectorate office is required to"keep watch over the interests of the state" and investigate all relevant economic and administrative questions relating to education in the area. The auditing office will become an instrument of control of the probity and efficiency of the institutions which receive public funds or administer state property. The precise tasks of the inspectorate in relation to administration had not been defined at the time of our visit. The office of supervision has the responsibility of verifying the correct functioning of the executory bodies so as to raise the efficiency of the educational system in the area of the region or zone through effective control and advice.

Chart 4 : ORGANIGRAMME OF THE VTH REGION OF EDUCATION (CUZCO)

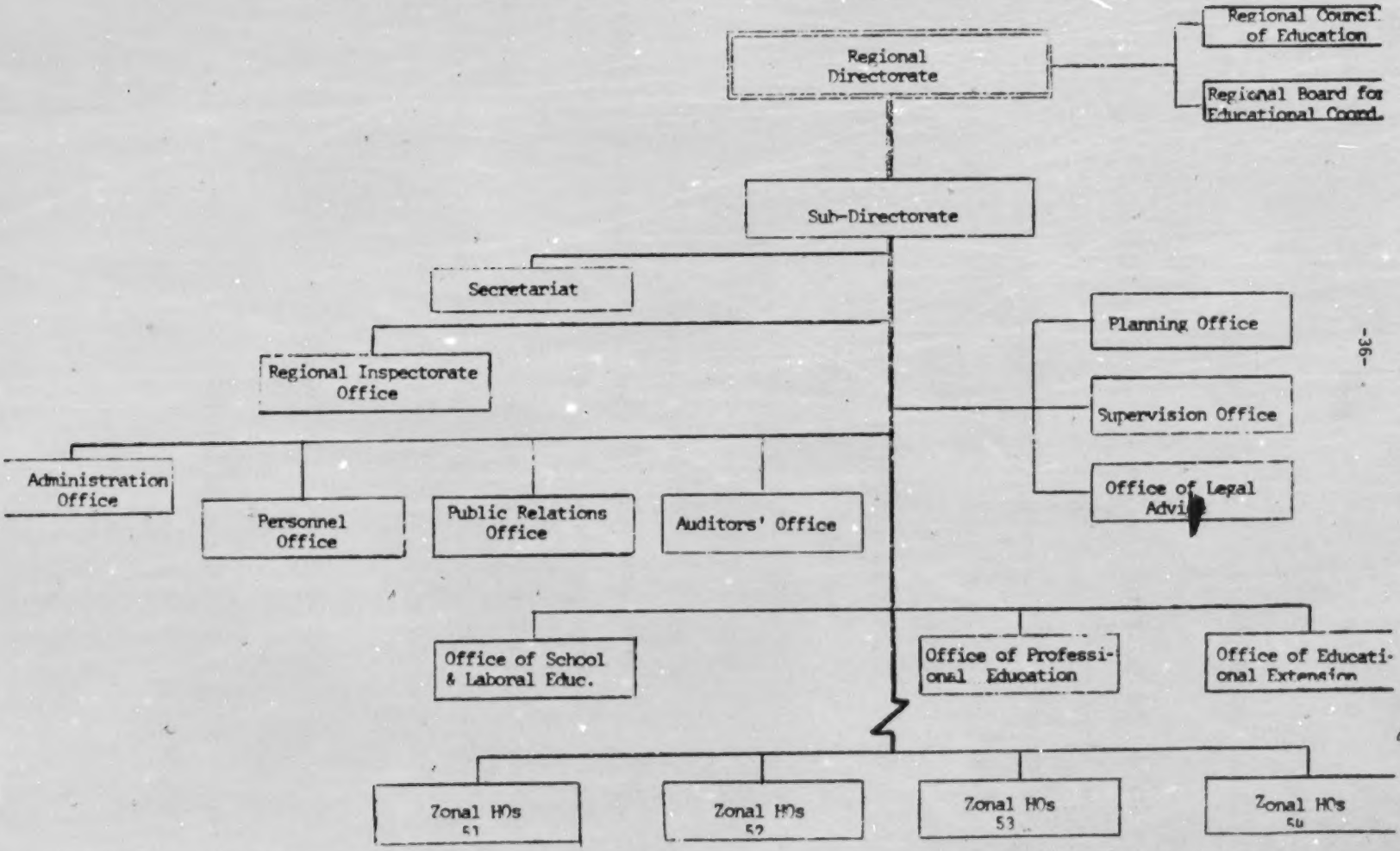
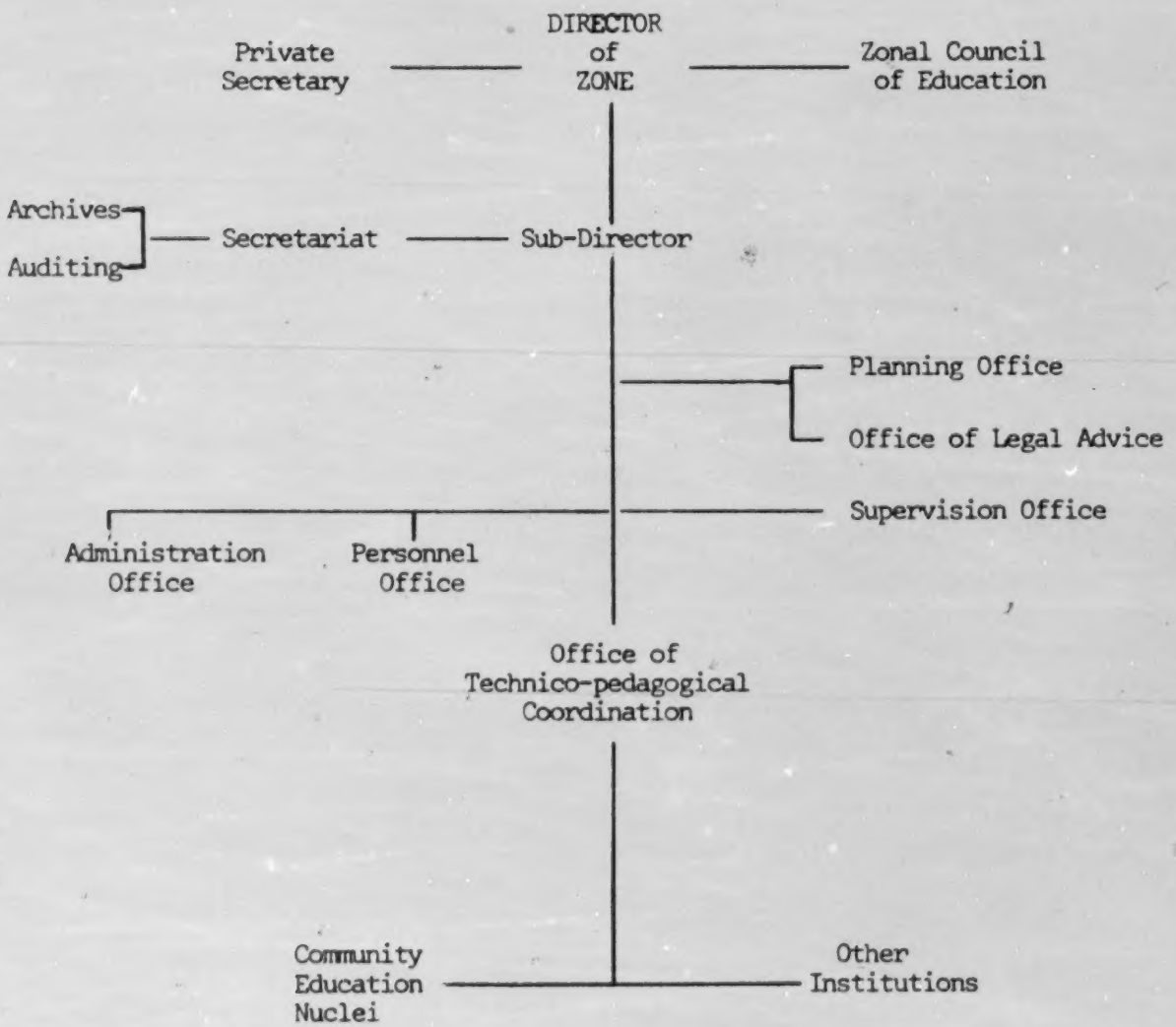


Chart 5 : Organigramme of zonal education headquarters No. 3, (Callao, Lima Metropolitana)



63. In this connection, there are a certain number of points at which the work of the regional supervisor, who is essentially responsible for verifying and ensuring that national policies are being followed, coincides with that of the technico/pedagogical office. The office for school and "laboral" education, for example, is supposed to "plan, organise, direct, coordinate, control and evaluate the educational process in initial, basic regular, laboral and special education and ... cooperate with directors of educational plants in the correct interpretation and application of plans and programmes in accordance with the dispositions applied by the High Direction" in Lima. It is not altogether clear, in this connection, why the functions of the technico/pedagogical teams, (see para.58) which, as we have seen, are of a norm-creating character at the national level, should exist at the regional level, since the norms created in the national Ministry in Lima might, in principle, be transmitted directly to the 33 zones and adapted by the pedagogical teams working in the zones. Moreover, there are at present quite large teams of "trainers" in each of the zones, who could also be expected to assist in the adaptation of national programmes to zonal circumstances. The duplication of function at the three levels discussed may perhaps be based on other than technical considerations.

64. It would appear that one of the aims of the administrative reform is that, at the regional and zonal levels, the sections of supervision and technico/pedagogical offices should work closely together. There is a certain nuance in the description of their respective functions from which it appears that the supervision sections are responsible, on behalf of the regional, zonal directors, for seeing that the "execution bodies", that is the regions, zones and nuclei, are functioning correctly from a technico/pedagogical point of view and they should provide control and guidance to that effect. Hence, the national supervisors inspect the work of the regions and zones, the regional supervisors, the zones and the nuclei,

and the zonal supervisors inspect that of the nuclei and the provinces. The technico/pedagogical offices are required to provide assistance, guidance and technico/pedagogical coordination to the educational institutions located in the regions and zones. In this sense, the offices issue norms and guidance to the schools and the supervision sections, but also the offices, see that these norms and guidance are being followed up in practice.

65. To sum up : data on the staffing of the administration in Lima were restricted and were not available. At the regional level (see Table 1), it could be estimated that professional staff employed in administrative control, assessment, advice and communication relating to the process of basic laboral and extension education amounted to 261 persons, or a half of the total professional employment, in the nine education regions ; of these, 180 were staff of the offices of basic, laboral and extension education, 27 were officers of regional inspection, 45 were staff of offices of supervision, and nine were auditors.

66. In each of the 33 zones, the team of technico/pedagogical advisers consists of six persons (one Chief, one initial, one "básica regular" and "laboral", one physical education, one extension education, and one guidance and student welfare). There are also,normally, for each zone, three teams of "trainers", whose function is the provision of training and follow-up relating to the reform ; they consist of seven for basic regular, seven for basic laboral, and three for initial in the zones of the Vth Region, but these numbers vary according to the zone. In addition, there are two inspectors, two supervisors and an assistant, and one auditor. This gives a total of 900 professionals in the 33 zones out of an estimated total of 1,500 professional employed in them. Thus, at the regional and zonal levels together, leaving aside the substantial but unknown numbers of national staff in Lima, some 1,150 professionals are available for different types of inspecting and supervising work. This, in view of the specialist staffing of the nuclei, seems quite a lot.

Table 1 : Staffing of an Education Region (5th Region)(1).

	Professional category	Statistical & secretarial staff
Director + personal secretary and assistant	1	2
Deputy Director + personal secretary and secretariat	1	13
Office of Regional Inspection	3	1
Office of Regional Administration : (Budget, Accounting, Supply infrastructure and Internal administration)	7	21
Personnel Office	4	5
Public Relations Office	1	2
Auditing Office	1	2
Planning Office	6	2
Supervision Office	5	2
Legal Advice Office	1	1
Office of Basic and Laboral Education	12	2
Office of Professional Education	7	1
Office of Education Extension	8	1
Totals :	57	55

(1) Source : Manual of Organisation and Functions, 1972.

Provincial supervisors

67. A main emphasis of our enquiry is on the national supervision system, since, prior to the administrative reform, it was this which represented inspection in Peru. As Table 2 below shows, there were 336 supervisors in Peru in 1972, and of this total 217 were supervisors of provinces or sectors. Since the administrative reform of 1971 had abolished provincial and sectoral supervision and formally replaced it by the direct zonal supervision of the nuclei, it should be mentioned that, in 1972, provincial and sectoral supervision was still in existence, and there was questioning among the authorities in Lima as to whether, in fact, it was desirable to dispense with it completely. This question will be resolved during the long transitional period which is foreseen, and it is certain that there will only be one structure at the end.

Table 2 : Staffing of National System of Supervision (as of March 1973)

National supervisors	10
women	1
men	8
posts vacant	1
Regional supervisors	40
women	8
men	28
posts vacant	4
Zonal supervisors	69
women	2
men	53
posts vacant	14
Provincial and sector supervisors	217
women	1
men	210
posts vacant	6
National total :	336

68. The needs for provincial supervision, using the word supervision in the Peruvian sense of members of the national educational supervision, part of the inspection service, would seem to be greater in the countryside than in the towns. In both areas, their availability for work of assessment and advice in the schools had been increased as a result of the mechanisation and centralisation of salary payments, of staff of the educational system, in Lima; this change freed them from the heavy duty of administering regular salary payments in their area. In the towns, the provincial and sectoral supervisors continue to be responsible for the non-nuclearised schools ("areas of conversion") and carry out administrative duties in respect of them. In addition, the nuclei,at the time of our visit, were not yet staffed with the administrators who, on paper, are required to undertake all the administrative support work in the nucleus area. Some provincial supervisors were therefore including this work among their duties, while in other cases administrative duties concerning nuclei were being carried out by the zonal headquarters. In due course, and assuming that the nuclei eventually are able to take over all relevant educational administrative tasks, the provincial and sector supervisors can become either specialists or administrators in the nuclei, (i.e. selected and trained), supervision of the nuclei being done by the zonal staff.

69. In rural areas, the problem is more complex, because of the great difficulties of communication. If, for example, we look at zone no. 18 of the 8th Region (Trujillo), there are seven provincial offices, of which two, situated 110 and 135 Kilometres away respectively, on the coastal plain, are not difficult to reach if transport is available, which it seldom is. The other five are located in the sierra, at the end of some of the most difficult and dangerous roads in the world. To visit the furthest removed, Bolivar (400 Kilometres), three

days' travel are required, and it takes two days to get to Patas (300 kilometres). In the present circumstances, provincial supervisors and, in certain provinces, sector supervisors are essential in each province, since the Sierra towns are almost completely isolated from the zonal and regional headquarters.

70. The fact that, apart from the mail, which is slow, and in most cases the telephone, there is virtually no communication means that personal contacts with zonal and regional authorities are scarce. In the Trujillo and Cuzco regions, respectively, there were two cars of respectable age available for the work of the regional educational administration, as compared with 20 vehicles in each for the agricultural administration. The supervision sections in the zones possessed no transport and were obliged to take their turn in the long queue within the regional administration when they required it. Moreover, within the regional and zonal budgets, there was only one common item for travel and living allowances (movilidad and viatico). This not large fund was, it seemed, assigned in first priority, and perhaps not unreasonably, to the senior officers of the region and zone, with the result that the regional and zonal supervisors were able to visit the sierra once a year, but not more, as part of a senior staff mission. A consequence of this situation is that there is little supervision in situ of what the provincial supervisor is doing.

71. The isolation of the mountain provinces has a particular bearing on the implementation of the reform, since it is precisely in these areas that lack of participation of the population in education is greatest. As has been mentioned above, it will be necessary for the authorities to bring a considerable volume of human resources to bear on this area if the rural nuclei are to be revitalised within the reform. At present, however, nuclearisation is taking place in those areas where transport is not a problem, and the provincial supervisors in the more isolated areas must cope as best they can.

72. The functions of the provincial and sectorial supervisors are both administrative and technical. Although it has been officially decided that, with the centralisation of salary payments, they should spend three-quarters of their time in technical/pedagogical and one-quarter in adminstration, this seems difficult to apply in rural areas. The administrative tasks concern teachers, pupils and parents and mainly involve the following operations, mostly requiring transmission of documents from the province to the zone and back :

Teachers

Tables of teachers on the pay roll

Dismissals

Transfers and movement queries

Exchanges

Promotions (record of years of service, teacher to headmaster)

Qualification

End of career pensions

Pay problems (arrangements for teachers to be paid)

Recognition of merits (extra work, community building).

Pupils

Enrolment records (approval)

Transfers (approval)

Record of passage from year to year

Certificates of studies

Parents

Complaints

Requests by parents

Requests by schools of parents.

73. In addition to the above, provincial and sector supervisors are required to prepare quarterly statistical tables on education in their area, transmit all official documents to the school directors, prepare the draft budget in respect of the personnel under their jurisdiction, provide information on enquiries, censuses, programmes, as decided by the zone, and fulfil any other function which the zonal chief may assign.

74. The provincial and sectoral supervisors are required to prepare an annual supervision plan and keep the chief of the zonal education office informed about its implementation. The plan for 1972 seen at Urubamba, (about 60 Kilometres from Cuzco), provincial office required the supervisor to "orient, coordinate and evaluate the work of the school directors" and a special form (see pages 54 and 55) was provided for the purpose of evaluation. The supervisor had also to "guide the teachers in the realisation of the educational reform, collect experiences and innovations of a positive character which could be generalised by higher educational authorities, and ensure that the legal provisions relating to education were carried out."

75. The supervisor was assisted by four teacher auxiliaries in carrying out this task in three districts extending down the Urubamba valley, the mighty sacred valley of the Incas which is difficult of access, and the villages on the plateau above it. On the occasion of our visit, we met some teachers and a headmaster at the provincial headquarters, who told us that, since there was no money for transport, the supervisory work concerning the 62 primary schools in the area had, to the best of their knowledge, been confined to administrative matters except in Urubamba itself. A director of a school 20 Kilometres from Urubamba said that his school had not been visited in the preceeding two years, except on an administrative matter. In Urubamba, one "trainer" from Cuzco had provided a

five-day course on the reform attended by 25 primary school grade I teachers in May 1972, but directives concerning attendance at the course had arrived too late to be applied in his school. In December 1972, a week-end discussion on the new procedures for evaluation of pupil performance took place in Urubamba. A teacher from the town of Urubamba said that, on the initiative of school individual directors and teachers, a number of teachers had followed a training course on the reform held by the "trainers" in Cuzco in the first three months of 1972. Their judgment of the course was favourable. But since their schools were not nuclearised, they had not received the books and materials necessary to apply what they had learned. Nevertheless, participation in the course may perhaps be judged as a good thing in the light of future planned development.

76. The provincial supervisor of San Pedro de Lloc, who was responsible for four school districts on the coastal plain about 60 Kilometres north of Trujillo, provided an example of an impeccably organised office complete with progress charts and a small library of books on the reform. He was responsible for 46 non-nuclearised schools and had organised three-day meetings of the 205 teachers and headmasters, with the help of the Trujillo-based trainers, on the teaching of new mathematics, language and natural science. These had been followed up with monthly district meetings on evaluation and on the above teaching problems. The staff of the teacher training college were providing special consultation and discussion with local teachers of grades 1 to 3 of primary. Arising from the meetings, five headmasters had been elected and had agreed to form a supervisory team which visited schools in the province in order to help teachers and headmasters with their work. In addition, a number of teachers had taken part in the three-months training course held in Trujillo. The provincial supervisor said that the greatest difficulties he encountered were the lack of books and materials for introducing the new programmes in the schools where teachers had received training for them, and the fact that there

were no funds available for travel expenses of staff and teachers who attended meetings.

77. Table 3 indicates that one year after the introduction of nuclearisation, the distribution of provincial supervisors, in relation to schools and teachers, does not show a sufficient concentration in favour of the rural areas, which account for nearly two-thirds of the primary schools and one-third of the teachers. Given the extremely difficult geographical conditions, it would seem necessary to plan in terms of one supervisor to 100 teachers. When the rural areas are eventually nuclearised, this ratio will be achieved. But even with nuclearisation, it would seem that provincial supervisors should remain and that adequate transport for them and for the specialists should be provided to enable them to do their work. What seems needed is a sufficient number of light, tough, inexpensive vehicles, so that they can visit the schools regularly.

78. In view of the strategic importance for the reform of the work of the provincial supervisor, it is noteworthy that he enjoys no particular financial benefits. A provincial supervisor must be a qualified (category 1) teacher, have had 18 years' service or more, and have participated in a competition, the results of which may not necessarily be taken into account. There is no difference between his salary and that of school directors or classroom teachers, except for a special responsibility allowance paid to supervisors in the Lima Metropolitana region. On the other hand, zonal, regional and national inspectors receive progressively higher salaries according to their level.

Table 3 : Distribution of provincial supervisors (March 1973)

Region	No. of supervisors	No. of primary schools	No. of primary teachers	Schools per supervisor	Teachers per supervisor	% rural schools in total	% rural teachers in total
Lima metropolitana	20	2,118	16,111	101	806	8.3	5.2
I (Chiclayo)	33	3,053	8,266	93	250	66.3	38.2
II (Lima)	21	1,995	5,826	95	277	59.8	36.1
III (Huancayo)	38	3,529	8,763	93	231	72.4	45.1
IV (Arequipa)	14	1,001	3,996	71	285	49.7	20.4
V (Cuzco)	22	1,866	4,840	90	220	69.8	43.3
VI (Iquitos)	15	1,518	3,782	101	252	61.7	34.8
VII (Puño)	14	1,267	3,289	90	235	84.2	57.8
VIII (Trujillo)	40	3,487	9,131	87	228	68.0	40.3
PLRU (Total)	217	20,034	64,004	92	295	60.6	31.0

Sources : Supervisors. Ministry of Education on Schools and Teachers. National School Census, Volumes I and II.

Zonal supervisors

79. A distinction may be drawn between the placing by an inspector of a stamp of approval, or disapproval on the work of a school or a teacher according to a defined set of criteria laid down from above, and an informed assessment of the resourcefulness, initiative, innovation and originality shown by the school and the teacher. The provincial supervisor, in coordinating and guiding the work of individual institutions must act as an agent of the zone and the region and therefore, inevitably, in filling in the inspection forms compliance with official instructions and completion of official forms will be of first importance. His initiative may be shown in such matters as the organisation of school libraries with community support, the organisation of inter-school competitions, for example in language or mathematics, or the designation of teachers for "resolutions of congratulations", on the basis of their work. But, given his long professional background and his limited time, neither he nor his district supervisors can provide the substantial and individualised assessment and example which is expected of the nucleus specialist in basic education. The zonal supervisors , for their part, are responsible both for the nuclei and the provinces. It is therefore relevant to examine their functions from the standpoint of the type of supervision they give.

80. The concept of zonal supervision that emerges from conversations and from official documents is that it is directed towards assessing whether defined administrative and pedagogical norms are being met. This means that it is the duty of the zonal supervisors to verify whether the functioning of the subordinate offices and institutions, as judged by what is happening in the schools, is being carried out in accordance with laws, regulations and other current dispositions and to seek to raise the efficiency of the work through effective advice. Zonal supervision is undertaken in the urban nuclei, the rural

educational nuclei and the schools which are included in them, in the provincial areas and the non-nuclearised schools and in the higher institutions of professional training, such as teacher training colleges, technical colleges, etc. (see Graph 1) in the zone.

81. As regards the method of supervision, it is the duty of all supervisors to note the positive and negative aspects of the institutions which they visit. The brief manual issued to all supervisors and heads of institutions by the Ministry of Education (June 1970) on the "doctrine and technique of supervision of education", defines positive aspects as those "which by their importance and repercussions constitute a valuable contribution to the national educational system". It does not specify what aspects should be looked for. The negative aspects are "those activities which have been omitted or have been accomplished in an unsatisfactory manner . They enable a determination to be made of the true situation of the supervised institutions". Negative aspects are classified under deficiencies, irregularities and observations. Deficiencies are the result of unsatisfactory execution or omission of one or more activities, for which the Director or Chief of the supervised body is responsible and on whom it is incumbent to take the necessary remedial action. Irregularities are violations of laws or regulations for which the Director or Chief is responsible and which give rise to an investigation in relation to the fault involved. Observations relate to situations for which higher authorities are responsible and about which recommendations are made. All supervisors are required to keep a written record of deficiencies, irregularities and observations and to communicate copies of them to the institution concerned and to the zonal chief supervisor on the day they are made.

82. The inspection visit normally consists of an initial conversation between the supervisory team and the directors and teachers, in which the aim of the visit

and the way it is to be carried out are discussed, followed by visits to the classrooms and discussions on suggestions for improved classwork and other improvements. Reports on "positive aspects" which we saw, were usually confined to generalities, such as the cooperative attitude of directors and staff towards the supervisors, rather than innovations which were worthy of emulation. Negative aspects included the neglect by school directors of what goes on in the classroom, lack of retraining of the teachers, inadequate use of available teaching materials and the negative reactions of parents towards the educational reform. Little notice appeared to have been taken by the directors and teachers of recommendations made in previous visits.

83. The work of the zonal supervisors is carried out in accordance with general directives, which lay down the norms and procedures to be followed. At the beginning of each year an annual plan of supervision and an annual plan of activities are prepared. The supervision plan contains a brief analysis of the situation of education and of the degree of fulfilment of the work of supervision in the preceding year and states the objectives, in general terms, for the year's work. It includes a general guide for the activities of each of the zonal and provincial supervisors. The annual plan of activities contains a list of the specific programmes of supervision which are to be undertaken in addition to the investigation of special problems and complaints. Coordinated teams made up of technico/pedagogical specialists from the zones, nuclei, zonal and provincial supervisors and trainers are established to carry out programmed work of supervision visits.

84. In the annual report on zonal supervision in zone No. 03 (Lima Metropolitana) for 1972, completed at the end of the year, it was stated that, in addition to normal visits, which appear to be largely concerned with administrative matters, nine special programmes of supervision and inspection were included :

01. Verification of enrolment and of teaching duties in 25 institutions of afternoon and evening education (13 to 17 April).

02. Verification of enrolment and "control of school work" in State and private schools (26 to 28 April).

03. Verification of enrolment, planning and organisation of State and private schools (15 to 19 May).

04. Inspection of the Centre for Artesanal Training (2 June).

05. Inspection of the National Mixed College "Our Lady of Belen" (9 June).

06. Verification and control of the work of the sectoral (provincial) supervisors (26 to 28 June).

07. Control and assessment of the educational process in secondary schools (4 to 8 September).

08. Programme of supervision of the technico/pedagogical and permanent evaluation aspects in the nuclearised schools (month of October), with participation of specialists from the zone and nuclei, "trainers" and zonal supervisors.

09. Programme of supervision of the technico/pedagogical and permanent evaluation aspects in the kindergartens (18 to 27 October), by specialists, "trainers" and zonal supervisors.

85. A record for one zone of the total number of visits, i.e. normal control and assessment in schools plus special programmes, including general supervision, investigation of specific questions, unannounced supervisions, visits and checking operations appears in Table 4 below. It may be seen that it did not prove possible for the supervisors and their colleagues mentioned above who worked with them, in this primarily urban zone, to visit more than 40 per cent of the primary (basic regular) schools, for all reasons, during the year's work. In this

Table 4 : Number of educational institutions supervised and number of acts of supervision. 1972. Zone 02 (Lima Metropolitana)

Level	No. of institutions	No. of institutions supervised	Percentage	No. of acts of supervision
Kindergarten (Initial)	38	20	53	20
Primary	197	68	40	86
Laboral	29	20	69	28
Secondary	47	10	21	51
Sec./Technical	16	7	44	28
TOTAL	327	125	38	213

connection, the national inspectors who visited the zone in September 1972 recommended that travel costs should be paid to members of zonal supervisory teams when they visited provinces and nuclei, in order that more schools might be visited. They also recommended that the supervisors should give greater attention to technico/pedagogical matters in the course of their work. It was not clear that these recommendations had been put into effect.

86. The work of the zonal supervisors in visiting provincial supervisory offices and nuclei is aimed at completing a number of very detailed forms concerning all aspects of the work of those bodies. These visits may be part of a general programme of supervision, a specific programme relating to one aspect of the work, i.e. personnel, administration, technico/pedagogical supervision, etc., unexpected visits and visits for the purpose of checking. Visits to provincial offices and nuclei are supplemented by visits to the schools themselves, in cooperation with other zonal and nuclei staff, in order to complete the assessment of the work of the supervisory bodies.

87. Thus, for example, the form for the supervision of schools as seen in zone 51 (Cuzco) provided a complete analysis of staff, pupils, physical plant and facilities, administration, pedagogic aspects, student organisation, social and cultural aspects and human relations. As regards all these aspects of the life of the school the supervisor and the persons assisting him were required to answer detailed questions as to whether the stipulated requirements for personnel, materials or activities were complied with or not and if they were to state whether the result was excellent, good, normal, deficient or bad. The sum of the enquiry was a series of assessments, signed by the supervisor and the school director, concerning urgent needs, deficiencies, irregularities, and observations which was transmitted to the zonal chief.

88. As regards the pedagogical aspects, forms seen refer to the plan of the school and the direction of the learning process. As regards the school plan the following questions were asked and noted :

(a) Has the school got a plan ? (Yes, no, excellent, good, normal, deficient or bad).

(b) Have school planning meetings taken place ?

(c) Is there coordination between the school plan and that of the provincial supervisor and the classroom supervisor ?

(d) Is the school plan based on a good diagnosis ?

(e) Are the objectives and methods contained in the school plan realisable given the possibilities of the school ?

(f) Is the plan integral in that it includes the pedagogical, administrative and social aspects of the work of the school ?

(g) Are the different programmes consistent with the objectives being reached ?

(h) Is the director carrying out the school plan ?
(i) Are all the teachers fulfilling the classroom plan ?
(j) Have the teachers prepared analytical programmes ?
(k) Do the teachers use detailed class plans ?
(l) Is the director fulfilling his functions as supervisor of the school ?
(m) Does he coordinate the activities of the school ?
(n) Is the system of integral evaluation applied ?
(o) Is systematic evaluation applied ?

89. As regards the learning process, the following questions were asked :

(a) Do the teachers plan their daily work by hours ?
(b) Do the teachers employ active methods ?
(c) Do the teachers use the teaching materials available in the school ?
(d) Does discipline prevail ?
(e) Are the classrooms well organised from a pedagogical standpoint ?
(f) Do the teachers evaluate the pupils with justice and equity ?
(g) Are the class registers completed according to instructions ?
(h) Are the class registers up-to-date ?
(i) Is the system of permanent evaluation applied according to the regulations ?

A more detailed form relating to the educational supervision of classroom teachers may also be completed. It is annexed to this report (Annex I). The completion of this form could be part of a complete visit (about 10 per cent of total visits), or a special visit. Normally the supervisor spends about 25 minutes at the back of the class observing in order to complete it.

90. From discussions with supervisors and teachers, it would appear that these questions allow the supervisors to state certain facts about planning and class work, in relation to current regulations and approach practices, but do not permit a thorough and constructive discussion with teachers and directors on how class work may be improved in a questioning, listening, explaining sequence. Perhaps the main conclusion is that the first responsibility for the supervision of classroom work, and of the school, lies with the school director and

that, at present, he or she would not seem to be carrying it out. On a number of occasions we learned that the school director should give leadership in the interpretation and application of the curriculum, the organisation of teaching and guidance to pupils. But we learned also that the directors received no training for these duties and that they conceive their job in the main in a purely administrative sense. They do not seem, in general, to visit the classrooms either to provide leadership in a pedagogical sense to the teachers or to report on the work of the teachers. A second impression is that, as of 1973, the process of supervision visits was carried out by the zonal supervisors in a checking and assessing sense, in order to compile reports on deficiencies, in relation to plans, which need to be remedied. This is distinct from the more participatory and guiding approach employed by the nuclei specialists and, where follow-up of training courses in the schools can be coordinated by the zones, by the "trainers". In addition the zonal office of technical/pedagogical coordination, which includes specialists in initial and basic regular, basic laboral, physical, extension education and guidance provides personnel who participate in inspection visits and follow them up by meetings, conferences, seminars and guidance to the teachers and nuclei specialists.

91. A substantial part of the time of the zonal supervisors, variously estimated at between a half and three-quarters of the total is spent in administrative work and meetings and visits connected with it. Normally, in each zone there are two or three zonal supervisors and a chief supervisor. They are responsible for all educational levels in State and private education, together with two specialist supervisors in physical education and a variable number of provincial supervisors. The zonal supervisors are responsible for maintaining and servicing complete records, including statistics on the matters affecting pupils, teachers and schools mentioned above in connection with provincial supervision, for which the zone has responsibility. In addition, the supervisors are required to transmit directives received from the

region and the Ministry to the subordinate executive bodies and to investigate and settle complaints.

92. In zone 03, Lima Metropolitana, for example in 1972, the supervisors prepared 98 official letters, 85 reports, 91 memoranda and 24 decrees for circulation to the nuclei, provincial supervisors and individual schools. They also dealt with 101 out of 104 complaints received during the year. The time spent by supervisors on strictly pedagogic activities is thus limited. Nevertheless, discussions with different supervisors showed that some of them participate in courses organised by the INIDE trainers referred to above in seminars designed to improve the functioning of and coordination between the nuclei.

93. The zonal supervisors are normally selected through a national competition held in March each year. They are teachers, either primary or secondary, with more than 15 years' service in education. They are expected to have followed a course in supervision, though this is not always the case, since there are no facilities on a national scale for the systematic training of supervisory and specialist pedagogical personnel.

Regional supervisors

95. The general law on education (decree law No. 19326 of March 1972) states, in Section II : "supervision should have a character of encouragement and advice rather than checking and domination so as not to coerce the initiative of the teacher and the local community". In Article 55 of the law, it is said "systematic and permanent supervision will verify the correct functioning of the technico/pedagogical and administrative aspects of the educational system and provide the technical advice needed by educators so as to raise its functional efficiency".

96. In its report on activities in 1972, the second educational region (Lima Metropolitana) refers to difficulties in meeting these objectives. These included financial means for the minimum objectives for the work of the supervision office and lack of trained operational personnel. In its assessment of the situation of supervision in the fifth region (Cuzco) as part of the 1973 supervision plan, it is said that studies made in two provinces show that there is not an adequate operational and functional plan of supervision for the schools of the region. The teachers in general have not received the benefits of adequately planned supervision. Visits are infrequent, brief, and only of an administrative and fault-finding nature. Within the school and classroom, the Director does not supervise. There is an absence of team work and coordination. Money is lacking for adequate work.

97. The plans for regional supervision show an enlightened appreciation of what should be done. The objectives have been summarised(1) as :

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(1) Source. Vth educational region, Annual supervision plan, 1973.

(a) Provide educational supervision which benefits the children, teachers and community in general.

(b) Guide and assess the work of the teachers in all aspects of educational work.

(c) Promote greater functional efficiency and encourage the dialogue between the base and higher levels.

(d) Guide educational action as a function of change and development in the community.

(e) Develop among those supervised a sentiment of security, a creative and critical spirit, and the achievement of good human relations which can stimulate cooperative effort and interaction.

(f) Promote the investigation and solution of technico/pedagogical problems.

(g) Offer opportunities for the development of leadership which emanates from individual qualities and not from authority.

98. The programme of activities of regional supervision, which are the subject of semi-annual reports, stipulate that monthly calendars of activities should be prepared and visit forms drafted (as broadly speaking for the zones above) for each level of education. The work of the zonal supervisory offices should be"coordinated, guided, assessed, controlled and evaluated", as should that of provincial and sectorial supervision, which is concerned with the non-nuclearised sector. The doctrine and technique of supervision should be diffused. Working meetings, courses, seminars should be organised with provincial supervisors, directors of teacher training colleges, secondary and technical institutions and nuclei, and parent associationson matters concerning educational supervision and

planning. Supervision will be undertaken through programmed visits, interviews, meetings and group work. In the second region (Lima Metropolitana), it was stated that, in 1972, the nine operational projects giving effect to these objectives had to be cancelled for lack of finance(see paragraph 84).

99. As is the case with every other part and level of the educational system, the duties of the staff of the regional supervision office are defined in general terms in the regional manual of organisation and functions. Each regional office of supervision should be staffed, according to a decree of 1963 establishing regional supervision services, with a chief of the supervisory office and six supervisors, for primary, secondary general, secondary technical, teacher training and special, physical education, and rural school nuclei. Since the reform in 1972, there are either three or four supervisors normally responsible for initial, basic regular, teacher training and professional and nuclei and basic laboral respectively. But there are variations between the regions,in Lima Metropolitana, for example, there are five supervisors of whom one is responsible for physical education.

100. For financial reasons, it does not seem possible for the regional inspectors effectively to control and advise the zonal and provincial supervisors on their work. This is because vehicles are lacking as is money for travel costs. Thus, for example, in zone No. 8 (Trujillo), it was possible to visit three out of the five zones only once in 1972, on the occasion of an inspection tour made by the regional director of education accompanied by the chief of the Regional Supervision Office, the Chief of the Regional Administration, the Chief of the Technical Pedagogical Services and one regional inspector. But it was not possible to organise group visits to the zones, except for the one with headquarters in Trujillo or to provincial supervisors other than those located in or near Trujillo.

101. The supervisor of basic regular education, within the constricted mobility mentioned, is responsible for verifying, evaluating and reporting on the supervision of basic regular education, and on its qualitative and quantitative progress in relation to plans in the zones, provinces and nuclei of the region. In particular, he is supposed to investigate whether the regulations relating to the curriculum and methods of teaching, evaluation and guidance of pupils are being applied. He is also required to coordinate the work of supervision with current projects of the technico/pedagogical services and other bodies in the region, always assuming that the funds included in the regional budget for these purposes are sufficient. For example, the supervisor of basic regular of the Trujillo region was scheduled to participate, with technico/pedagogical specialists in the training of basic regular teachers in the use of "easily available" local materials for the first three classes, for science teaching. He was also to take part in the study of how to restructure the curriculum in bilingual areas and apply the new curriculum experimentally. Finally, he is responsible for the investigation of administrative and other matters at the direction of the head of the regional supervision office.

102. A study of activities shows that the regional supervisor employs the same system of checking and assessment as the zonal supervisor. He will complete checking lists and supervision sheets for the office he is inspecting, as well as the institutions which that office has inspected. The forms are broadly, but not completely, identical as between region and zone. They are characterised by their "yes" or "no" alternatives and the small amount of space available for observations, particularly in relation to pedagogical factors ; see for example Annex A on classroom teachers, the same form being used for both regional and zonal visits.

103. The work of regional supervisors is evaluated by the head of their supervision office in order to maintain individual dossiers of professional qualification. This is a trait-oriented rather than performance-oriented assessment which takes into account eight factors and five grades. These are quantity of work (e.g. little, below standard, normal, above normal, extraordinary), quality of work, responsibility, collaboration with others, social behaviour, initiative, administrative competence and supervisory skill. Apart from this assessment, there is no reference to attendance at training courses or to special achievements, for example post-graduate study.

104. Regional supervisors are nominated, after competition, by a resolution of the Minister of Education, whereas zonal and provincial supervisors are nominated by the Regional Director of Education. Senior regional supervisors are nominated by a "supreme resolution" signed by the highest authority. Regional supervisors must be teachers of the first category, second class, with at least five years' service and are normally, but not always selected as a result of a competition.

105. Regional supervisors are required to be specialists in the level or type of education for which they are responsible. In practice, this may mean that they have had teaching and administrative experience in that level and certain may have taken part in post-graduate courses in Peru or abroad relating to it. In Lima Metropolitana region, which is not necessarily typical of Peru as a whole, we were informed, for example, that, as of early 1973, no special training had been given to inspectors in the understanding of the new curricula and methods of teaching in primary education.

106. There is, at present, no special service, with stable personnel, responsible for the professional training of supervisors in Peru, and there is no period of probation for the different grades of supervisors with which such training might be integrated. Nevertheless, there have been a number of courses in supervision organised in Peru during the past decade. The National Institute for the Training and Improvement of Teachers, between 1962 and 1968, gave courses in educational supervision extending over two successive summers, as did the University of Cuzco (four successive summers) between 1961 and 1964, and the San Marco (Lima) University in 1961, and 1962. In 1965, the Ministry of Education with Teachers College Columbia (USA) provided a course in educational supervision. In 1965, Unesco and Unicef organised a seminar on supervision. Between 1966 and 1968, Unesco and Unicef held two courses in supervision which resulted in a total of 90 participants receiving certificates in supervision techniques. A small number of Peruvian supervisors have received training since 1968, with international assistance in foreign countries, for example in Brazil, Puerto Rico and Costa Rica.

107. In common with almost all supervision offices visited, regional offices have either no libraries or few books of reference. That for Lima Metropolitana, for example, used three works available in Spanish : "School Inspection"by Rodríguez Vivanco, "Organisation of Primary Schools" by Lemos and "Techniques of supervision for better schools" by Kimball Wiles, which refers to experience in the United States.

National supervisors

108. The national office of supervision is on the 12th floor of the 18-storey building in Lima, in which the national headquarters of the Ministry of Education is located. The office is responsible for verifying on behalf of the Minister that the technical/pedagogical work of the executing bodies, i.e. regions,

zones, provinces, nuclei and institutions is "functioning correctly so as to the efficiency of the educational system through the provision of effective assessment"(1). The precise form of the new inspectorate service, embodying supervision, administrative and financial control and special investigations had not been determined at the time of our visit.

109. Including a head of office, there were 13 national supervisors in 1973, compared with nine in 1972, i.e. two specialists in initial education, two basic regular, one guidance and pupil welfare, two basic laboral, one special, one nigher professional, one teacher training, one special professional, two physical education .

110. The visits of the national inspectors to the regions and zones take place in the school year between April and December. They follow consultation between the national inspector and the relevant technico/pedagogical directorates in the national ministry of education, and study of the relevant regional and zonal planning documents and reports. A visit to a region normally entails 12 working days' work of which six days are spent with pedagogical specialists and six in visiting institutions. The standard forms for verification and supervision which have been mentioned in connection with the region are employed by national supervisors. At the conclusion of their visit, their report outlining assessment, irregularities, deficiencies, observations and recommendations is signed by the regional director. Each report is submitted to the head of the national supervision office who sends it to the Minister with his comments. There does not appear to be any systematic follow-up in the sense of action memoranda from the head of the supervision office to the regional office or departments of the national office based on the Minister's comments ; the reports appear to be more information- than action-oriented.

111. It was stated that, in 1972, it was not possible for each supervisor to visit the nine regions of Peru owing to shortage of funds and the most favourable achievement was six regions and the least one region (Lima). However, the Head of the Office expected that, in 1973, budget difficulties would be solved so that all regions and some of the zones would receive at least one visit by each of the relevant specialists. National specialist supervisors are persons of high professional competence, with considerable experience, including publications to their credit. They are on a higher grade within the civil service structure than regional inspectors. The national supervisors assisted in 1972 in the provision of short training courses for supervisors of the Lima (capital) region and the zones based on the manual of supervision, which has been referred to. There is no doubt, given their competence, that this innovation might be extended with advantage to other regions.

CONCLUSIONS

112. Peru has embarked on a major reform of education designed to bring about a more complete union between the educational services and society in meeting the citizen's needs for education for life. A particular feature of the reform is the introduction of decentralisation at the local, nucleus, level and of arrangements which should encourage the community to participate in the operation of, and support for, educational institutions. The reform involves structural change, new curricula and quantitative expansion, which should meet the needs of the most deprived areas and sections of the community if the indispensable resources are forthcoming. So far the nuclei which have been established, and in which the new programmes for basic regular education are being introduced, cover only less than half of the schools. Particularly in the rural and mountainous areas,

and among the pueblos jovenes, a substantial effort will be required, in terms of government and community action, if the enlightened aims of the reform are to be realised and nuclearisation introduced and consolidated. The educational needs of the Indian-speaking population still represent a very considerable challenge in relation to the reform.

113. The aim of the reform is to use the school, seen in the widest context, as an instrument with which to overcome the isolation and sense of defeat of children and adults who do not benefit adequately or have not yet benefitted from education. It is, therefore, important that the examples, which, at present, seem relatively few of mobilising the community to make the school a beautiful, cheerful and well-equipped place should become more general practice. It is also essential that, within the nuclei institutions, ways should be found fully to liberate the creativity and enthusiasm of headmasters and teachers, both in the school and as regards the relations between it, parents and the community. There are examples of successful work in this sense in some of the areas visited ; they should be considerably extended.

114. When nuclearisation is completed in the next few years, education at the local level will be organised and administered in some 900 nuclei, covering the whole of Peru. The authorities plan that in each nucleus there should be a specialist team of four non-polyvalent specialists, i.e. each works in her specialisation only, who will be responsible for acting as advisers and animators in the type of educational institutions for which they are responsible. It remains to be seen whether the total cost involved will permit this proposal to be realised as a whole or whether some more polyvalent and less expensive solution will have to be found. But there is no doubt, as concerns initial and basic regular education, that the work of the nucleus specialists as

advisers and teachers of teachers is proving an extremely useful and valuable innovation and that the teachers welcome their help.

115. It is a truism, but perhaps a relevant one, to say that the success or failure of the reform will be decided in the schools. At present the headmasters are neither trained nor in many cases motivated to promote the discussion of the problems which the teachers, with a shortage of books and materials are meeting in the nuclearised schools. Some teachers have received relatively short periods of training in the professional problems involved in adapting the new learning by doing approach to classroom work and the new methods of pupil evaluation. This training has been provided by the élite corps of the INIDE trainers, who have now been put under the control of the zonal educational authorities. It would seem that the training of headmasters and teachers should be undertaken on a larger scale, and more intensively. The 1,200 teacher trainers in teacher training colleges and universities and the specialists and supervisors at national, regional, zonal and provincial levels, who together exceed 1,000 persons, should perhaps supplement the efforts of the 400 "trainers" for this purpose. In the consolidation phase of the reform, it would seem to be the case that there can only be one training force rather than two.

116. If the problem, as far as supervision is concerned, is to mobilise training and advisory personnel so that headmasters, teachers and specialists of nuclei are fully supported, it would seem that, as far as the rural areas and the Sierra are concerned, the critical point at which support forces might be concentrated is the province. This would enable the zonal authorities to be more assured that the necessary visits to the schools and training activities could be undertaken. It would also reduce the heavy burden of travel and living costs involved in bringing personnel to the regional headquarters for training. In the towns,

with greater mobility, it is planned that the provincial supervisors will be progressively phased out, with nuclearisation, so that their work will be done by the zones; this can be easily understood.

117. It is not clear what useful purpose is served by the inspecting and technico/pedagogical services, as distinct from the planning services, at the regional level since communication and guidance might well proceed directly from the national ministry to the 33 zones.

118. The system of inspection, which is not yet fully articulated, seems primarily designed as a means by which the Minister can be informed, as a result of assessment, of the performance of the subordinate executing bodies in respect of the administrative and pedagogical norms which it establishes. The new dispositions will eventually include provision for auditing, administrative control, special investigations and supervision. As far as supervision is concerned, the purpose of the visits of supervisors is to complete assessment, based on relevant forms, somewhat limited in their scope, of all aspects of the functioning of the body visited. These assessments are prepared in the sense of identifying deficiencies, irregularities and observations concerning departure from, or lack of compliance with, officially established norms. There would seem to be advantage that the supervisors should work closely with the "norm-creating" bodies (see para. 58) particularly in respect of curriculum implementation, examinations and guidance. There is perhaps insufficient emphasis on the underlying causes, and how they might be remedied, of failure to carry out national policy. Nor do the supervisors' reports appear to direct much emphasis to success which the authority in question may have achieved in certain directions. It would also seem, from the limited number of visits which were made, that whereas the arrangements for the transmission of reports upwards seemed fairly effective, those for remedial action in order to remedy deficiencies noted seemed to work less well, and it would seem necessary that steps should be taken to ensure that actions, which are recommended in inspectorate reports, where approved, are implemented.

119. The new type of inspection, being undertaken by the nuclei specialists, staff of certain technico/pedagogical sections, and "trainers", embodying mainly advice, training and encouragement, is therefore different from that of the supervisors, which is directed mainly, but not entirely, towards a checking and assessing function. It would seem that both are necessary, but that the form of the latter is not yet fully consistent with the new requirements posed by the reform; this can be improved through better planning at the various levels and the use of available personnel in a co-ordinated way.

120. The work of all types of personnel responsible for the different aspects of inspection is gravely hampered by lack of money and shortage of transport, which means that the staff who should be visiting institutions and administrative bodies do not do so. It would seem necessary that specific budgetary provision should be made for travel and living costs of supervising personnel and that each zone and province should be provided with an adequate number of light, tough vehicles adapted to the conditions which prevail. It is also necessary that education offices, nuclei, headquarters and schools should possess the requisite professional libraries which staff, headmasters and teachers can use. The respective supervision offices should become adequately-equipped centres in which professional problems of teachers and headmasters can be discussed and training and guidance given.

121. There have been a number of training courses in the past, in some of which Unesco and Unicef have participated, aimed at providing training for supervisory staff. But, at present, there are no arrangements whereby the requisite initial and subsequent in-service training of supervisors can be given on a national scale. It is necessary, however, that intensive training should be provided if the supervisors and technico/pedagogical personnel are to be in a position to give the requisite high level assessment and advice. A corollary to a new approach by the authorities to training in relation to career development would be some consideration of special incentives, particularly

at the zonal and provincial levels in respect of improved qualifications and more effective work. The same observation would seem to be relevant as far as headmasters and teachers are concerned. In conclusion, Peru has won world interest and acclaim for its pioneering educational reform ; the problem is to mobilise the concentration of effort, in which the inspectorate is to play its appropriate part, to ensure the consolidation of the reform.

ANNEX I

ANNEX I

VTH REGIONAL DIRECTORATE OF EDUCATION (CUZCO)

EDUCATIONAL SUPERVISION FORM FOR CLASSROOM TEACHERS

I. INFORMATION DATA

Educational zone No. ..... School No. .....
Name of the institution ..... Year(s) of study .....
Town/village ..... Province ..... Department .....
Start of the visit : Time ..... Date .....
School principal.....
Classroom teacher .....
Yearsin service ..... Category ..... Attended retraining course .....
Pupils enrolled ..... Attendance on day of visit .....

II. EDUCATIONAL STRUCTURE

CLASSROOMS - Condition ..... Environment ..... Pedagogical organisation .....

Location ..... Hygiene ..... Lighting ..... Ventilation .....
Capacity ..... Dimensions .....
Interesting features which it may have .....
.....

FURNITURE AND EQUIPMENT

Location and orientation of the blackboard ..... Organisation of the furniture .....

Number of : blackboards ..... desks ..... writing tables ..... tables .....

Chairs ..... Small chairs.....Writing cases: double ..... single ....
Benches ..... Cupboard ..... Shelves ..... Chest-of-drawers ..... Museum .....

Others .....

III. TEACHING MATERIAL AND AUDIO-VISUAL AIDS

Located in : the classroom ..... in the directorate ..... in a special classroom .....

Provided by the Ministry of Education ..... Acquired by the school .....
Prepared by : the teacher ..... the pupils .....

IV. ACTIVITIES (PLEASE LIST)

Regular educational duties consist of .....

.....

Relating to the Educational Reform .....

.....

V. ADMINISTRATION (HAS COMPLETED)

Integral evaluation register ..... Auxiliary evaluation sheet .....

Duty folders ..... Book of written examinations .....

Pupil's qualification book ..... Note book .....

Enrolment Forms Folder ..... Organisation of the Archives .....

Information card on the teacher's output .....

Teacher's evaluation form .....

Term summary sheet .....

Plan of the classroom ..... Fulfillment of programmed projects. .....

Other documents .....

VI. DIRECTION OF TEACHING

Method of teaching .....

Procedures ..... Methods .....

Technical progress of the lesson .....

In the work plan, the objectives concur with the suggested actions .....

Is the development of the programmes or curricula adequate ? .....

Dailyconduct of the class ? ..... of the lesson ? .....

Keeps to the : class timetable ..... civic calendar .....

Internal rule ..... Organisation of the pupil .....

TEACHING TASKS

Presentation of : class exercise books..... reading books .....

others .....

INTEGRAL EVALUATION

Do they evaluate in conformity with the rules ? .....Select procedures ? .....

Determine minimum qualifications ? .....

Qualify the examinations ? ..... Correct exercise books ? .....

PEDAGOGICAL ORGANISATION OF THE CLASSROOM (HAS OR HAS NOT A DESCRIPTION)

Library .....

Wall maps .....

Student organisation .....

Teaching materials .....

Competitions .....

VII. ASSESSMENTS

Of the site and conservation of the building .....
.....
Of the administration .....
.....
Of the technico-pedagogical procedures .....
.....
Of the social, economic and cultural aspects .....
.....
IRREGULARITIES .....
.....
DEFICIENCIES .....
.....
OBSERVATIONS AND RECOMMENDATIONS .....
.....
.....
.....
End of the visit : TIME ..... DATE .....

SIGNATURE OF THE CLASSROOM TEACHER

SIGNATURE AND SEAL OF THE SCHOOL PRINCIPAL.

SIGNATURE OF THE REGIONAL SUPERVISOR.